The Library Network (TLN)

Request for Proposal
For Activity Pass Software

March 2022

Proposals due April 8, 2022 5:00 p.m. EDT
Table of Contents

A. General Information p. 3
   A1. Background p. 3
   A2. Overall Intent and Purpose p. 3
   A3. Minimum Requirements for Activity Pass Software p. 3
   A4. Project Schedule p. 4
   A5. Official Contact p. 4
   A6. Procedure for Submission of Proposals p. 4
   A7. Evaluation Criteria p. 5
B. Overall Intent and Outcomes Desired p. 5
C. Corporate Background p. 5
D. Activity Pass Software Product p. 5
E. Implementation p. 6
F. Customer Support p. 6
G. Technical Requirements p. 6
H. Costs p. 6
I. Terms and Conditions p. 7
A. General Information

A1. Background

The Library Network (https://www.tln.lib.mi.us) is the largest library cooperative in the State of Michigan, serving residents throughout Wayne, Washtenaw, Oakland, Livingston, and St. Clair Counties. TLN’s 73-member libraries serve a population of 2.9 million – well over one quarter of Michigan’s population.

The Library Network strives to provide and facilitate quality library services to its member libraries, thereby improving library services to their communities. From its headquarters in Novi, Michigan, TLN provides a full range of products, programs and services.

One of those programs is the Michigan Activity Pass (MAP). The Michigan Activity Pass program is a statewide collaborative effort between Michigan’s public libraries and participating destinations. Destinations range from cultural destinations to state parks, campgrounds, and recreation areas. MAP provides Michigan library card holders the opportunity to discover/learn more about participating cultural destinations, state parks, campgrounds, and recreation areas in the state at a discounted rate.

This program was originally known as the Museum Adventure Pass and started out in 2007 in the Metro Detroit area under the sponsorship of Macy’s. In 2009 TLN took over the administration of the program. The program was rebranded as the Michigan Activity Pass and in 2013 the program went statewide. When the program went statewide it began utilizing the Plymouth Rocket software so patrons could check out museum passes online. To view the current MAP program/software go to: https://www.michiganactivitypass.info

Today, the program has 390 public libraries and 450 destinations that participate in the program.

A2. Overall Intent and Purpose

The Library Network is seeking proposals for a new activity pass software product for the statewide Michigan Activity Pass program.

A3. Minimum Requirements for MAP Software

- Mobile Responsive Interface/User friendly website for patrons
- Ability to search by location and venue
- Ability to book/reserve tickets
- Ability to print tickets and save tickets to phone
- Utilize Google maps to see what attractions are near me
- Be able to gather statistics at the at the cooperative level, and at the individual library and venue levels.
A4. Project Schedule

The Library Network anticipates the following key project dates:

- RFP released March 17, 2022
- Proposals due at TLN April 8, 2022
- Formal Review of Proposals week of April 11, 2022
- Contract signed June 10, 2022
- Begin using service January 3, 2023

A5. Official Contact:

The official contact for this Request for Proposal:

Brigette Felix  
Shared System Librarian  
The Library Network  
41365 Vincenti Ct.  
Novi, MI 48375  
bfelix@tln.lib.mi.us  
(248) 536-3100 ext. 137 (voice)  
(248) 536-3098 (fax)

In order to maintain a fair and impartial selection process, contact with other TLN staff or staff at member libraries about this RFP is prohibited. Failure to abide by this policy may result in disqualification of proposal. Suspected errors in the solicitation should be immediately reported in writing to the official contact.

A6. Procedure for Submission of Proposals

Proposals must be submitted electronically, via email, to the official contact. Emails should contain a subject line of MAP RFP Proposal.

Brigette Felix  bfelix@tln.lib.mi.us

Any proposal received after the hour and date specified (5:00 p.m. on April 8, 2022) will not be considered. It is at the sole discretion of TLN to accept or reject any modifications to proposals received after the closing date and time of the RFP. Bidder is solely responsible for submitting the proposal during business hours before the date and hour set for the opening of proposals.
A7. Evaluation Criteria

Proposals will be evaluated by TLN staff. Evaluation criteria are as follows: ability to meet requirements, qualifications, setup, implementation and training, and cost as detailed below.

B. Overall Intent and Outcomes Desired

As the administrator of the Michigan Activity Pass program for the statewide MAP program, TLN considers it a matter of due diligence to periodically review services offered. We wish to contract with a single vendor for software that has a: mobile responsive interface/user friendly website for patrons, ability to print tickets and save tickets to phone, and be able to gather statistics at the cooperative level, and at the individual library and venue levels.

Please tell us how your products will meet our needs and exceed our expectations.

Please provide 3 references of customers similar in scope.

C. Corporate Background

Please provide a brief history of your company and the corporate vision for its future.

What makes your company unique?

What new developments are you most excited about? Can you tell us about any innovative software improvements that have just been released, soon to be released, or in development? Where are you concentrating your development efforts?

D. Activity Pass Software Product

Today’s library users expect a Google-like search experience across all devices that is intuitive to use and returns results that are relevant to the search terms entered. Ticketing reservation software that will serve the widely different needs of a diverse population should include the following:

- User friendly website for patrons
- Functions on multiple current and future versions of all typical standard web browsers
- Ability to search by location/venue/destination in a variety of ways (name, zip code)
- Search facets that allow patron to limit search (by: all destinations, subject, kid friendly, ADA compliant, availability by date).
- Advanced searching option
- Relevance should compensate for misspelled search term without returning a wide array of results that do not appear to relate to the search term entered
- Response time should be reasonable and not leave the patron waiting
- Have the ability to use Google maps to be able to see what destinations are nearby
E. Implementation

- What services are offered to clients?
- Please provide a list of implementation work to be completed and by whom.
- What amount of time is needed for implementation?
- Who does the data entry?
- Can we load a spreadsheet?
- Will there be regular updates/meetings with TLN staff throughout the implementation process?
- Is a soft launch possible before the go live date of May 24, 2023?
- TLN is interested in training for TLN/MAP staff. Please indicate how training is offered, what information is covered, what amount of time is recommended for training as well as the cost for training.
- Do you have written documentation? Does it include materials that can support training on the public library staff/patron level?

F. Customer Support

Describe your customer support approach including staffing, hours, level of expertise, resolution time.

G. Technical Requirements

Please describe what options are available with your software. Is the option to locally host the software system available? What are the other hosting options? What is your recommended solution?

Please provide recommended requirements for all hosting options.

Please provide possible methods for loading of data from existing MAP software and the related technical requirements.

H. Costs

The prices discussed in this proposal will be the set prices for contract negotiations. The Library Network is interested in pricing for a 3 and 5 year term.

H1. Cost Formula

Please list the factors that will be used to calculate pricing. At this time The Library Network has almost 400 public libraries and over 400 destinations participating in the MAP program. Please include the cost to add a library or destination to the program as well as discount should a library or destination leave the program.
All prices should be supplied including initial costs, migration costs, software support, and ongoing maintenance costs. If additional services, not requested by this proposal, are being recommended by the bidder, they must be listed separately and not figure into the total.

I. Terms and Conditions

The following Terms and Conditions are in addition to those that will be contained in the signed contract. To the extent there are any conflicts between this RFP and the signed contract, the Terms and Conditions in the signed contract will prevail.

All responses, inquiries, and correspondence relating to this RFP and all reports, charts, displays, schedules, exhibits, and other documentation produced by the proposal process that are submitted to TLN as part of the proposal or otherwise shall become the property of TLN and may be considered public information under applicable law.

I1. Effective Term of Proposal

Unless a proposal is expressly rejected by TLN, all proposals will remain in effect for 210 days subsequent to the proposal opening. TLN may request that bidders extend the effective period of their proposals. Such requests shall be in writing and will require bidder’s written consent to the extension.

Bidder may not withdraw, cancel, or modify its proposal for a period of 210 days after the advertised closing time for the receipt of proposals.

I2. Award and Negotiations

This Request for Proposal does not obligate TLN to accept or contract for any expressed or implied services. Likewise, TLN is not obligated to award a contract pursuant to this RFP.

TLN reserves the right to enter into discussions with the bidders whose proposals are deemed most advantageous for the purpose of negotiation. If more than one proposal is found to be satisfactory, TLN reserves the right to negotiate simultaneously with more than one bidder.

If applicable, TLN will post a notice to its website recommending a preferred bidder. The notice extends the effective term of the bidder’s proposal until the parties sign a contract or determine not to sign a contract.

I3. Rejection of Proposal and Waiver of Informalities

TLN, in its sole discretion and authority, may determine that it is in the best interest of TLN to reject any or all proposals submitted in response to this RFP. TLN, in its sole discretion and authority, may disregard or waive any informality in the proposals or bidding process.
I4. Reservations

Bidder must read and understand the solicitation and tailor the proposal and all activities to ensure compliance. TLN reserves the right to amend the solicitation; reject any or all of the proposals; and waive minor defects. TLN may request a clarification, inspect bidder’s premises, interview staff, request a presentation, or otherwise verify the contents of the proposal, including information about subcontractors and suppliers. TLN may request best and final offers where appropriate. TLN will make all decisions on compliance, evaluation, terms and conditions, and shall make decisions in the best interest of TLN. Failure of a bidder to comply with requests for information or cooperate may result in the proposal being deemed non-responsive to the solicitation. Submitting a proposal does not entitle a bidder to an award or contract. TLN is not responsible for and will not pay any costs associated with the preparations and submission of any proposal. Awarded bidder shall not commence, and will not be paid for, any billable work prior to the date all parties execute the contract.

I5. Incorporating Costs

Bid prices must incorporate any/all peripheral costs including, but not limited to the costs of products/services, delivery/transportation charges, training materials, labor, insurance, applicable taxes, warranty, overhead and profit, etc. that are required by the RFP.

I6. Taxes

Bidder shall assume and pay all taxes, including state, federal, and local taxes, which are payable by virtue of the furnishing and delivery of materials or services specified. Materials and services purchased by TLN are not subject to either federal excise taxes or Michigan sales taxes. Bidders shall include all other applicable federal, state, and local taxes, direct or indirect, in their proposals.

I7. Withdrawal of Proposal

Bidders may withdraw their proposal at any time prior to the date and time for proposal opening. Requests for withdrawal may be made by submitting an email to the official contact for the RFP.

I8. Responsibility

A bidder is considered responsible when it has the capability in all respects to fully perform the contract requirements and has the integrity and reliability that will assure good faith performance. TLN will determine whether TLN can or should do business with a bidder. TLN may consider factors including, but not limited to certifications, conflict of interest, financial disclosures, past performance, references (including those found outside the solicitation), compliance with applicable laws, financial responsibility, insurability, equal opportunity compliance, capacity to produce, ability to provide required maintenance services or other
matters relating to the bidder’s probable ability to deliver the required services within the time and price as specified in this RFP.

19. Governing Law

Michigan law and rule govern this RFP and any resulting contract. Bidder must bring any action relating to this RFP or any resulting contract in the appropriate courts in Michigan.

10. Public Records and Requests for Confidentiality

All responses, inquiries, and correspondence relating to this RFP and all reports, charts, displays, schedules, exhibits, and other documentation produced by the proposal process that are submitted to TLN as part of the proposal or otherwise shall become the property of TLN and may be considered public information under applicable laws. However, TLN will consider requests for confidential treatment under Michigan Freedom of Information ACT (FOIA) (MCL 15.231). A request for confidential treatment will not supersede TLN’s legal obligations under FOIA. TLN will not honor requests to keep entire responses confidential. Bidders must show the specific grounds in FOIA or other law or rule that support application of confidential treatment. Regardless, TLN will disclose the successful bidder’s name, the substance of the response, and the price. If bidder requests confidential treatment, bidder must submit an additional copy of the response with the proposed confidential information redacted. This redacted copy must tell the general nature of the material removed and shall retain as much of the original response as possible. Bidder shall list the provisions, identified by section number, for which it seeks confidential treatment and identify the statutory basis under Michigan or other applicable law and include a detailed justification for exempting the information from public disclosure. Bidder will hold harmless and indemnify TLN for all costs or damages associated with TLN honoring bidder’s request for confidential treatment. Bidder agrees that TLN may copy the response to facilitate evaluation, or to respond to requests for public records. Bidder warrants that such copying will not violate the rights of any third party.

11. Bid Protests

The bidder shall submit any protest or claims regarding this RFP to:

Brigette Felix bflex@tln.lib.mi.us

A pre-bid protest must be filed no later than five calendar days before the proposal opening date, a pre-award protest must be filed no later than ten calendar days after the proposal opening date, and a post-award protest must be filed no later than ten calendar days after the award of the contract. Awards are not final until all protests are resolved.
All protests or claims must set forth the name and address of the protester, the specification number, the grounds for the protest or claim, and the course of action that the protesting party desires.
<table>
<thead>
<tr>
<th>Weight</th>
<th>Scoring Category / Description</th>
<th>Criteria</th>
<th>Summary of response</th>
<th>Score (1-5)</th>
<th>Summary of response</th>
<th>Score (1-5)</th>
<th>Summary of response</th>
<th>Score (1-5)</th>
<th>Summary of response</th>
<th>Score (1-5)</th>
</tr>
</thead>
<tbody>
<tr>
<td>30%</td>
<td>Proposed software features and services</td>
<td>How well does Company’s software serve MAP’s needs</td>
<td>They state they can deliver: mobile responsive interface, search by location, reserve tickets &amp; save to phone and collect statistics.</td>
<td>2.00</td>
<td>printable passes, save tickets to phone, statistics at cooperative level and individual library level as well as user friendly site and variety of ways to search</td>
<td>2.00</td>
<td>Mobile responsive interface, search by location/venue, book/reserve tickets, gather statistics at cooperative and individual library level</td>
<td>3.00</td>
<td>Mobile friendly responsive interface, reporting available at cooperative and individual library level</td>
<td>5.00</td>
</tr>
<tr>
<td>30%</td>
<td>Pricing</td>
<td>Cost of Goods and Services</td>
<td>$31,525 for year one and $19,000 for year two and three.</td>
<td>4.00</td>
<td>$61,300 for year one.</td>
<td>1.00</td>
<td>$16,940 for year one, year two - five $7,700</td>
<td>5.00</td>
<td>One time migration cost is $5,000. Annual cost for three year contract is $33,804, and for five year contract is $28,975</td>
<td>3.00</td>
</tr>
<tr>
<td>20%</td>
<td>Implementation and training</td>
<td>Service offered for implementation</td>
<td>Provided a detailed implementation plan that includes train the trainer (will be recorded)</td>
<td>3.00</td>
<td>They will handle implementation. They will provide webinar training and will have a recorded session as well as written documentation.</td>
<td>4.00</td>
<td>They will handle implementation with input from TLN staff. Training by web based sessions.</td>
<td>3.00</td>
<td>Provided an implementation/training plan</td>
<td>3.00</td>
</tr>
<tr>
<td>10%</td>
<td>Point of contact</td>
<td>Dedicated project manager or point of contact</td>
<td>No specific point of contact, instead listed multiple people.</td>
<td>2.00</td>
<td>They provided Jesica Rathjen as a contact for questions regarding the RFP - no project mgr. identified.</td>
<td>4.00</td>
<td>No specific point of contact provided.</td>
<td>2.00</td>
<td>Melissa Stockton was provided as contact for questions regarding the RFP - no project manager identified.</td>
<td>4.00</td>
</tr>
<tr>
<td>10%</td>
<td>Service experience</td>
<td>History of relationships of this nature (commercial, service industry, medical)</td>
<td>Provided three references, but they don't utilize museum pass product.</td>
<td>3.00</td>
<td>They provided 3 references for clients similar in scope. Museum Key has been in existence for awhile.</td>
<td>5.00</td>
<td>Provided three references and has a long history of experience with TLN.</td>
<td>4.00</td>
<td>Provided three references that are similar in scope.</td>
<td>5.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>100%</th>
<th>Total Weighted Score</th>
<th>LocalHop</th>
<th>2.90</th>
<th>OCLC</th>
<th>2.60</th>
<th>Plymouth Rocket</th>
<th>3.60</th>
<th>Quipo</th>
<th>3.90</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Rank</td>
<td>3</td>
<td></td>
<td>4</td>
<td></td>
<td>2</td>
<td></td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Weight</td>
<td>Scoring Category / Description</td>
<td>Criteria</td>
<td>LocalHop</td>
<td>OCLC</td>
<td>Plymouth Rocket</td>
<td>Quipo</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>--------</td>
<td>-------------------------------</td>
<td>----------</td>
<td>----------</td>
<td>------</td>
<td>----------------</td>
<td>------</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>30%</td>
<td>Proposed software features and services</td>
<td>How well does Company’s software serve MAP’s needs</td>
<td>LocalHop I have concerns with potential WordPress security issues, and also that their museum pass product seems to be brand new and not in use by any library, anywhere.</td>
<td>OCLC MuseumKey is a product I’ve not actually seen. Were we interested in pursuing I would recommend either a demo from OCLC, and/or a check with the three clients provided as references.</td>
<td>Plymouth Rocket TixKeeper Mars appears to be a re-worked and not very much improved version of TixKeeper. That said, although MAP is still not a secure (https) site, the three sites given.</td>
<td>Quipu product has several high end, high volume current clients (California Discover and Go; Brooklyn, RAILS). Based on this I am pretty confident the software could handle a project the size</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>30%</td>
<td>Pricing</td>
<td>Cost of Goods and Services</td>
<td>LocalHop total three year cost $69,525. LocalHop total five year cost $102,385. $23,175 average three cost (including first year cost). $20,477 average five year cost (including first</td>
<td>OCLC total three year cost $191,246.47 OCLC total five year cost $339,385.82. $63,942.15 average three year cost (including first year cost) $67,877.16 average five year cost (including first</td>
<td>Plymouth Rocket total three year cost $72,340. Plymouth Rocket total five year cost $47,740. $10,780 average three year cost (including first year cost). $9,548.00 average five year cost</td>
<td>Quipu total three year cost $106,412. Quipu total five year cost $149,875. $35,471 average three year cost (including first year cost). $29,975 average five year cost (including first</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>20%</td>
<td>Implementation and training</td>
<td>Service offered for implementation</td>
<td>LocalHop provided a satisfactory implementation and training plan</td>
<td>OCLC provided a somewhat limited implementation and training plan</td>
<td>Plymouth Rocket provided somewhat limited details concerning implementation and training</td>
<td>Quipu provided a satisfactory implementation and training plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10%</td>
<td>Point of contact</td>
<td>Dedicated project manager or point of contact</td>
<td>LocalHop provided multiple, as opposed to dedicated, points of contact for purposes of this project.</td>
<td>OCLC referenced Jessica in their Capira division in their cover letter. However a dedicated point of contact for their project was not noted. It seemed along the lines of &quot;Sign the contract first and...&quot;</td>
<td>Plymouth Rocket provided a point of contact for purposes of this project</td>
<td>Quipu provided multiple, as opposed to dedicated, points of contact for the specific product we would be using</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10%</td>
<td>Service experience</td>
<td>History of relationships of this nature (commercial, service industry, medical)</td>
<td>LocalHop provided no references for the specific product we would be using, which tells me we would be their first customer.</td>
<td>OCLC provided three references for the specific product we would be using.</td>
<td>Plymouth Rocket appeared to provide one reference for TixKeeper Mars (Seattle) and two references for TixKeeper (Boston and Iowa). It was hard to say for sure, though.</td>
<td>Quipu provided three references for the specific product we would be using</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>100%</th>
<th>Total Weighted Score</th>
<th>2.90</th>
<th>2.80</th>
<th>3.60</th>
<th>4.20</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rank</td>
<td></td>
<td>3</td>
<td>4</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Weight</td>
<td>Scoring Category / Description</td>
<td>Criteria</td>
<td>LocalHop</td>
<td>Score (1-5)</td>
<td>Summary of response</td>
</tr>
<tr>
<td>--------</td>
<td>--------------------------------</td>
<td>----------</td>
<td>----------</td>
<td>-------------</td>
<td>-------------------</td>
</tr>
<tr>
<td>30%</td>
<td>Proposed software features and services</td>
<td>How well does Company’s software serve MAP’s needs</td>
<td>Print/save tix. ADA compliant. Up-to-date on security. Dedicated team for project. Use TLN style. Stats, user-friendly, maps, easy search. Also offered other for-fee items.</td>
<td>2.00</td>
<td>Mobile responsive. Search by venue or date. Location? Print/save tix. Based on Physical Passes?</td>
</tr>
<tr>
<td>30%</td>
<td>Pricing</td>
<td>Cost of Goods and Services</td>
<td>Year one $31,525, Year two and three $19,000. Implementation included in year one ($12,525). Zero annual increase. 5-year discount.</td>
<td>4.00</td>
<td>$63,300, plus 4.25% annual increase. Based on pickup locations? No implementation fee mentioned.</td>
</tr>
<tr>
<td>20%</td>
<td>Implementation and training</td>
<td>Service offered for implementation</td>
<td>When will the software be released? When can we demo? What limits can be placed in the system? Authentication means?</td>
<td>2.00</td>
<td>They will handle implementation. They will do a live webinar for staff training, and record it for later access. Seems to have used 73 members in RFP for locations?</td>
</tr>
<tr>
<td>10%</td>
<td>Point of contact</td>
<td>Dedicated project manager or point of contact</td>
<td>Yes. Looks like they will need to do some development. NICE clear project plan.</td>
<td>5.00</td>
<td>Not mentioned?</td>
</tr>
<tr>
<td>10%</td>
<td>Service experience</td>
<td>History of relationships of this nature (commercial, service industry, medical)</td>
<td>Works primarily with libraries. Owned by Cynerge. Activity Passes is an upcoming release: <a href="https://getlocalhop.com/roadmap/">https://getlocalhop.com/roadmap/</a></td>
<td>5.00</td>
<td>Plenty of experience with libraries. Museum system is based on physical passes and been around a long time.</td>
</tr>
</tbody>
</table>

| 100%   | Total Weighted Score | | 3.20 | 2.45 | 3.75 | 3.80 |
|--------|---------------------|| Rank | 3 | 4 | 2 | 1 |
Request for Proposal- Activity Pass Software

Submitted to:
Brigette Felix
Shared System Librarian
The Library Network
41365 Vincenti Ct.
Novi, MI 48375
bfelix@tln.lib.mi.us
(248) 536-3100 ext. 137 (voice)
(248) 536-3098 (fax)

Due Date:
Friday, April 8th, 2022, 5:00 pm EST

Submitted by:
31 N Saginaw St, Pontiac, MI 48342
mrusell@cynerge.com
(248) 952-9800
The Library Network
Request for Proposal – Activity Pass Software
RFP #00-000 Due 04/08/2022 @ 5:00pm EST

Table of Contents

A. Cover Letter 4

B. Overall Intent and Outcomes of our Solution 4

   References 5
   Customer Reference Name: Derek Brown, Rochester Hills Public Library 5
   Customer Reference Name: John Bry, Main Street Oakland County 7
   Customer Reference Name: Tammy Turgeon, Suburban Library Cooperative 9

C. Your Provider of Activity Passes 11

   History of Cynerge - Partners for your Cooperative 11
   Tested and Proven Innovation 11

D. Activity Pass Software 13

   Requirements that we will Successfully Execute and Deliver 13
   Mobile Responsive Interface and a User-Friendly Website for Patrons 13
   Search by Location and Venue 13
   Book and Reserve Tickets 14
   Print and Save Tickets to Mobile Devices 14
   Accessibility to Google Maps 14
   Collect Statistics at the Cooperative, Individual Library and Venue Levels 14

   Our Approach 14

E. Project Schedule Implementation 16

   Services Available to Clients 18

   Implementation Work 18
   Our Approach to Program Management 20

   Soft Launch Options 20

   Training for The Library Network/Michigan Activity Pass Staff 20

F. Official Contact for Customer Support 22

   Meet your Team 22

G. Technical Know-How to Integrate Options and Legacy Information 24

   Available Options with our Software 24

   Recommended Requirements for Hosting Options 24

   Methods for Integrating Current MAP Software Data 24

H. Costs 25

   H1. Cost Formula 25
I. *Terms, Conditions, and Assumptions*  

I1. Effective Term of Proposal  
I2. Award and Negotiations  
I3. Rejection of Proposal and Waiver of Informalities  
I4. Reservations  
I5. Incorporating Costs  
I6. Taxes  
I7. Withdrawal of Proposal  
I8. Responsibility  
I9. Governing Law  
I10. Public Records and Requests for Confidentiality  
I11. Bid Protests
A. COVER LETTER

The Library Network can rely on LocalHop to be more than just a web design firm. We are a specialized group of consultants serving libraries across the United States, excelling in the design and programming of applications and websites tailored to serve your patrons. We understand how libraries operate, which is why we have constructed a comprehensive and personalized proposal that addresses your needs, will exceed your expectations, and benefit The Library Network and the community members it serves.

B. OVERALL INTENT AND OUTCOMES OF OUR SOLUTION

Our software is designed with the human experience in mind. Mobile responsive, intuitive from both the internal and public side, our software is consistently modernized. Our activity pass module will allow patrons to print passes from their computers, tablets and mobile devices, as well as include reports with data for the venues, libraries and TLN. Any time a new feature is designed and built, we run A/B testing for mobile responsiveness. More importantly, our services are completely Section 508 and ADA compliant, and our customer support is responsive, courteous and helpful.
References

Customer Reference Name: Derek Brown, Rochester Hills Public Library

<table>
<thead>
<tr>
<th>Company/Client:</th>
<th>Contacts:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name: Rochester Hills Public Library</td>
<td>Name: Derek Brown</td>
</tr>
<tr>
<td></td>
<td>Title: Director of IT</td>
</tr>
<tr>
<td></td>
<td>Phone: 248-650-7123</td>
</tr>
<tr>
<td>Dates of Service:</td>
<td>Email: <a href="mailto:derek.brown@rhpl.org">derek.brown@rhpl.org</a></td>
</tr>
<tr>
<td>Performance Start – 10/01/2018</td>
<td>Address: 500 Olde Towne Road</td>
</tr>
<tr>
<td>Performance End – Ongoing</td>
<td>City, State: Rochester, MI</td>
</tr>
</tbody>
</table>

Project Description:

**Understanding of Target Audience**
Rochester Hills Public Library (RHPL) provides life-long learning opportunities, instills a love of reading within their patrons and community members and offers equal access to information. The library serves as a community town square, where visitors enjoy innovative ways to learn and socialize through a variety of programs, including an annual summer reading challenge, parent-child workshops and weekly lectures. The library’s expansive and user-friendly database system allows cardholders to utilize ebooks, movies, and music downloads, language and genealogy services, tutor.com and consumer reports from the comfort of their home at no cost.

**Solution Objectives**
- Launching a new web experience optimized for mobile display security, and compliance with ADA Section 508 accessibility standards
- Creating a website header that is similar to the Innovative Interfaces Inc. (iii) Vega product header
- Integrating the website with Polaris ILS, which will help authenticate users as well as connecting the site to several external vendor sites and databases
- Receiving ongoing hosting and operational support
- Integrating with LocalHop’s event management platform, including calendars, registration and room management
- Ongoing feedback and requests of the LocalHop software (calendars and room reservation) are prioritized and built in a timely manner to better suit the staff and patrons of RHPL

**Security Objectives**
- Preventative measures against brute force attacks
- Provide a plugin-based firewall and WPEngine Firewall for a two-layered security approach
- Automated weekly plugin and theme updates to fix vulnerabilities or incompatibilities
- Cross-site scripting prevention

**Website Objectives**
The current site ([https://rhpl.org/](https://rhpl.org/)) is having challenges with site administration workload and seamless applications. We will address this by ensuring key aspects are automated, making staff work lighter and delivering a seamless look between website and application.

**Content Management System Objectives**
- Provided a user-friendly content management system
- Provided a user-friendly front and backend visual builder
- Allow for user roles on demand

**Training Strategy**
By using a “train the trainer” approach, LocalHop provided a dedicated training session and documentation on how to use and maintain the website solution. LocalHop is available to answer ad hoc questions as RHPL staff enter or create content and pages.

**Corporate Differentiators**
The same team members proposed for your project also worked together on this project. They are an established team that has performed and successfully executed quality projects together for hundreds of clients. In doing so, they offer a level of efficiency, professionalism, and understanding second to none.

**Project Team Members**
- Courtney Bordeaux (Project Manager)
- Shawn Chapiewski (Programmer)
- Steven Moore (Programmer)
- Devon Taylor (UI/UX Designer)

**Warranty and Service Level Agreement**
LocalHop uses WPEngine as our dedicated provider to offer a premium tier availability of 99.99% towards website uptime.

**Link to site**
[https://rhpl.org/localhop-calendar#events/](https://rhpl.org/localhop-calendar#events/)
Customer Reference Name: John Bry, Main Street Oakland County

<table>
<thead>
<tr>
<th>Company/Client:</th>
<th>Contacts:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name:</strong> Main Street Oakland County</td>
<td><strong>Name:</strong> John Bry</td>
</tr>
<tr>
<td><strong>Title:</strong> Principal Planner</td>
<td><strong>Phone:</strong> 248-858-5444</td>
</tr>
<tr>
<td><strong>Email:</strong> <a href="mailto:bryj@oakgov.com">bryj@oakgov.com</a></td>
<td><strong>Address:</strong> 2100 Pontiac Lake Road Building 41 West</td>
</tr>
<tr>
<td><strong>City, State:</strong> Waterford, MI</td>
<td></td>
</tr>
</tbody>
</table>

**Dates of Service:**
- Performance Start – 01/01/2022
- Performance End – 05/31/2022

**Project Description:**

**Understanding of Target Audience**
Main Street Oakland County (MSOC) is our unique economic development program for downtowns with a historic preservation philosophy and an emphasis on "sense of place." We help local government develop their downtowns as vibrant, successful districts that serve as the heart of their communities.

**Solution Objectives**
- Expand the Visit Oakland County website that showcases the cultural, lifestyle and entertainment assets of Oakland County’s Main Street communities by adding ten additional communities
- Increase local connection to places and attract new talent, tourism and investment
- Maintain the tourism-focused site that promotes Oakland County Main Streets
- Increase the coverage of the website so that it includes all Oakland County Main Street communities
- Support the Oakland County Main Street communities with community-focused pages, content and media
- Maintain event calendars on the website with community events in each of the participating Main Street communities (deferred to FY2022 for the communities)
- Support MSOC in promoting the Oakland County brand across the participating communities

**Security Objectives**
- Preventative measures against brute force attacks
- Provide a plugin-based firewall and WP Engine Firewall for a two-layered security approach
The Library Network
Request for Proposal – Activity Pass Software
RFP #00-000 Due 04/08/2022 @ 5:00pm EST

- Automated weekly plugin and theme updates to fix vulnerabilities or incompatibilities
- Cross-site scripting prevention

**Website Objectives**
Since 2019 – LocalHop developed a brand new website, new branding, intuitive user experience across site and for internal staff updating the site and integrated the LocalHop Events platform to manage and promote events.

**Content Management System Objectives**
- Provided a user-friendly content management system
- Provided a user-friendly front and backend visual builder
- Allow for user roles on demand

**Training Strategy**
By using a “train the trainer” approach, LocalHop provided a dedicated training session and documentation on how to use and maintain the website solution. LocalHop is available to answer ad hoc questions as Main Street Oakland County members enter or create content and pages.

**Corporate Differentiators**
The same team members proposed for your project also worked together on this project. They are an established team that has performed and successfully executed quality projects together for hundreds of clients. In doing so, they offer a level of efficiency, professionalism, and understanding second to none.

**Project Team Members**
- Courtney Bordeaux (Project Manager)
- Shawn Chapiewski (Programmer)
- Steven Moore (Programmer)
- Devon Taylor (UI/UX Designer)
- Mike Laney (Designer/Programmer)

**Warranty and Service Level Agreement**
LocalHop uses WP Engine as our dedicated provider to offer a premium tier availability of 99.99% towards website uptime.

**Link to site**
https://visitoaklandcounty.com/
Understanding of Target Audience
The Suburban Library Cooperative is a network of public libraries located within the Macomb County area that have joined together to perform services more effectively and economically. Established in 1978 under Michigan Public Act 89 of 1977, the Cooperative provides member libraries with several important services, including automated circulation of library materials as well as access to the Internet. The Suburban Library Cooperative also assists member libraries in a variety of ways; in their efforts to better serve the public, they provide continuing education opportunities for staff and access to a variety of digital resources.

Solution Objectives
• Digital revamp of libcoop.net to include Improved usability and overall user interface of the customer facing website
• Maintain the information level of the current SLC website
• Support the SLC members with admin-focused pages, content and media
• Maintain event calendars on the website with community events happening within the SLC
• Digital revamp of sister site Virtual Library Card

Security Objectives
• Preventative measures against brute force attacks
• Provide a plugin-based firewall and WPEngine Firewall for a two-layered security approach
• Automated weekly plugin and theme updates to fix vulnerabilities or incompatibilities
• Cross-site scripting prevention

Website Objectives
Since 2021 – Initially, this was intended to be a website refresh project. However, the client realized that they wanted LocalHop to completely restructure and focus on their security protocols. We also integrated the LocalHop Event Registration platform within their website.

**Content Management System Objectives**
- Provided a user-friendly content management system
- Provided a user-friendly front and backend visual builder
- Allow for user roles on demand

**Training Strategy**
By using a “train the trainer” approach, LocalHop provided a dedicated training session and documentation on how to use and maintain the website solution. LocalHop is available to answer ad hoc questions as Suburban Library Cooperative staff enter or create content and pages.

**Corporate Differentiators**
The same team members proposed for your project also worked together on this project. They are an established team that has performed and successfully executed quality projects together for hundreds of clients. In doing so, they offer a level of efficiency, professionalism, and understanding second to none.

**Project Team Members**
- Courtney Bordeaux (Project Manager)
- Shawn Chapiewski (Programmer)
- Steven Moore (Programmer)
- Devon Taylor (UI/UX Designer)

**Warranty and Service Level Agreement**
LocalHop uses WPEngine as our dedicated provider to offer a premium tier availability of 99.99% towards website uptime.

**Link to site**
https://libcoop.net/slc/
C. YOUR PROVIDER OF ACTIVITY PASSES

History of Cynerge - Partners for your Cooperative

Founded in 2005, Cynerge Consulting Inc. (Cynerge) is a team of over 40 professionals offering comprehensive knowledge of IT Services, and an ability to deliver complex solutions in a way that makes sense to our customers. In 2015, a facet of Cynerge, dba LocalHop, was founded by TOG Development LLC with the hopes of developing an efficient and easy-to-use software application that local communities could use to access all events happening within their neighborhood. However, our LocalHop founders quickly realized that there was a significantly large gap between the events calendar space and public libraries. Thus, began our transformation. LocalHop’s sole focus completely transitioned to public libraries and web calendars in 2019, and, in 2020, our room reservation platform went live and is actively used by many libraries today. Within the past two years, the LocalHop team has now doubled in size and is actively continuing to grow at the administrative, design, and development levels.

This company is unlike any other competitor on the market; our passion and drive for active community engagement is unparalleled. When LocalHop was founded, engaging patrons with their communities was the sole purpose of the company. This is why our transition into the library market has allowed us to not only continue to serve patrons through the libraries, but to expand into other industries that engage businesses, organizations, and other community members. For example, the LocalHop community calendar allows all businesses and organizations to seamlessly share events to one, cohesive calendar that is hosted on the library’s website. The result? New patrons, connections, and buzz circulating around the community hub: your library.

LocalHop has an active role in the state of Michigan. Apart from servicing XX libraries through our web calendars and room reservation software, providing community calendars to 25 libraries utilizing a Ploud subsidized website through the Library of Michigan, and has built a custom tourism website showcasing 13 communities in Oakland County. We love to give back to our home state, and are in the process or actively trying to grow each of these projects. In 2021 the Library of Michigan, and Sonya Norris renewed the LocalHop/Ploud partnership for a third year in a row. LocalHop is also in the process of adding 10 additional communities and refreshing the Visit Oakland County website. Finally, LocalHop is an MLA Partner, and in 2020 we presented alongside Mimi Herrington, then Director of Bad Axe District Library, at the virtual MLA conference on how to grow the community calendar and how building those partnerships benefitted the library.

Tested and Proven Innovation

Aligning with our mission to provide easy-to-use and accessible software to libraries and their patrons, we are thrilled to announce that activity passes are the next step in our pipeline. This software service will continue to foster engagement between libraries, local organizations and
venues, while simultaneously establish an avenue for patrons to access library resources to connect with the same organizations and venues.

LocalHop had the incredible opportunity to attend the Public Library Association (PLA) Conference this year, which was held in Portland, Oregon. There, we proudly showcased our activity passes module, which gained significant traction and generated a lot of exciting conversation with attendees, which is why we are elated to expand our newest feature through the MAP program if given the opportunity. Additionally, we are looking forward to enhancing and modernizing our room reservation software based off the helpful feedback received from current clients and relative market research. Development will begin as we approach Q2. Currently, we are gearing our concentration towards creating multiple custom library websites, maximizing small software enhancements, and finalizing our activity passes. LocalHop prides itself on being honest, communicative, and transparent with our clients, which is why our product roadmap can be viewed at any time on our public company website. Born by libraries and built for the community, LocalHop aims to give back to libraries, just as libraries do for the patrons and communities they serve.
D. ACTIVITY PASS SOFTWARE

Requirements that we will Successfully Execute and Deliver

Mobile Responsive Interface and a User-Friendly Website for Patrons

An exceptional website design is not determined by the aesthetic visuals, logic of code or social proof; it’s determined by a solid strategy, strategic research and objective planning. Rather than just making a website beautiful on the surface, we focus on your overall audience per demand, internal and external pain points, user cases and listening to your needs to create an intuitive experience as well as strategic solution.

- Cynerge/LocalHop will adopt the style guides and formatting that is in use by the current Library Network website.
- We will conduct a light design refresh (at the Library Network’s direction), as needed.
- We will conduct a design phase for this effort in to gather the necessary information to restructure and organize the website and content in a user-friendly manner. This will include interviews with key Library Network staff regarding the user feedback, user personas and usability goals.
- We have determined that a full content migration and rehosting to our Wordpress hosting service is necessary. As a result, our bid may be heavier in hours than others, however, this investment with upfront work will enable all requirements of the RFP to be met. This includes migration to a hosting solution that meets the service level requirements, such as: “The website should have a Service Level Agreement that assures availability of > 99.99%, average page response of < 2 seconds and < 15-minute recovery from any outage including disaster.”
- By adopting our approach of conducting a full content management system, fresh install and rehosting, you immediately remove the risk of the unknown. Ensuring that the website, associated services and integrations meet the high requirements of the Library Network and minimize and mitigate security risks will ultimately produce the best end results. Other companies may propose that they can reuse the existing installation, but this will create unnecessary risk on the County which is not ideal.
- Additionally, this fresh install will support the redesigned organization of the website and content, supporting the input we gather in our design phase.
- It is our standard and of the upmost importance to provide a Section 508/ADA compliant site that is mobile responsive and user friendly.

Search by Location and Venue

We will provide the ability to search and limit passes by location, venue, keyword, availability by date, zip code, category and feature (kid-friendly, ADA compliance etc.). We will then separate the search functionality into a quick search and advanced search option that will support a variety of user needs. While searching, users will have a Google-type of search experience across all devices that is intuitive to use and returns relevant results to the search terms entered, even if terms are misspelled.
Book and Reserve Tickets
We will provide the ability to book and reserve tickets, along with sending email reminder notifications and ability to cancel tickets.

Print and Save Tickets to Mobile Devices
We will allow patrons to print the reservation, download the pdf at the time the reservation is made and receive that pdf in an email within the reservation confirmation.

Accessibility to Google Maps
We will utilize a geographic search displayed on a map using Google API to see what destinations are nearby. We will also provide a map with pin locations of all venues within a certain radius.

Collect Statistics at the Cooperative, Individual Library and Venue Levels
We will provide a “reports” dashboard to gather statistics at the cooperative level as well as the individual library and venue levels.

Our Approach
We begin with the end in mind with the application of Design Thinking and a thorough interview process up front. All of our team members will be present to ensure everyone is on the same page and we understand your unique needs and goals; and that we meet them on time and on budget. When working through any project we always start with gathering the details necessary for briefing a particular issue, pain point, and general information regarding the task at hand. Before layouts are developed, we need to understand the context that’s being presented and provide enough research for delivering a strategized solution. This allows for a better representation of your brand, ideal target audience, data being collected, and essential needs towards gathering the structure and foundation of a new website and activity pass module.

Our team collaborates through an ideation phase for crafting the important pieces towards your website which passes into the first set of conceptual layouts and designs. With the newly fashioned concepts we prototype and test each layout to preview functionality as well as any issues. Based on feedback we’ll move forward on additional ideas or make revisions. Once approved, all layouts are pushed into development and implemented for live usability. This process is called design thinking and is repeated for each layout as the designs form into an intuitive and functional website.
### E. PROJECT SCHEDULE IMPLEMENTATION

<table>
<thead>
<tr>
<th>#</th>
<th>Action Plan</th>
<th>Responsible</th>
<th>Target Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>STAGE 0 – Project Planning</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Bi-weekly Meetings</td>
<td>Courtney</td>
<td>Bi-weekly</td>
</tr>
<tr>
<td>0.0.1</td>
<td>We will provide bi-weekly meetings to keep in line with client vision and give progression updates.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>STAGE 1 – Implementation Checklist</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Existing features of our Activity Pass product.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.0.1</td>
<td>Mobile Responsive Interface/User friendly website for patrons</td>
<td></td>
<td>Completed</td>
</tr>
<tr>
<td>1.0.2</td>
<td>Ability to book/reserve tickets</td>
<td></td>
<td>Completed</td>
</tr>
<tr>
<td>1.0.3</td>
<td>Functions on multiple current and future versions of all typical standard web browsers</td>
<td></td>
<td>Completed</td>
</tr>
<tr>
<td>1.0.4</td>
<td>Response time should be reasonable and not leave the patron waiting</td>
<td></td>
<td>Completed</td>
</tr>
<tr>
<td></td>
<td><strong>STAGE 1.1 – Product Enhancements</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Additional development of search, filter functionality, &amp; patron pass management</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.1.1</td>
<td>Ability to search and limit passes by location, venue, keyword, availability by date, zip code, category, and feature (kid-friendly, ADA compliance etc..).</td>
<td>Shawn + Steve</td>
<td>3 weeks</td>
</tr>
<tr>
<td>1.1.2</td>
<td>Google-like search experience across all devices that is intuitive to use and returns relevant results to the search terms entered, even when using terms that are misspelled.</td>
<td>Shawn + Steve</td>
<td>1 week</td>
</tr>
<tr>
<td>1.1.3</td>
<td>Separate search functionality into a quick search and advanced search option to support variety of user needs.</td>
<td>Shawn + Steve</td>
<td>1 week</td>
</tr>
<tr>
<td>1.1.4</td>
<td>Use a geographic search displayed on a map using Google API to see what destinations are nearby</td>
<td>Shawn + Steve</td>
<td>1 week</td>
</tr>
<tr>
<td>1.1.5</td>
<td>Allow patrons to print the reservation, download the pdf at reservation time, and receive that pdf in an email in the reservation confirmation.</td>
<td>Shawn + Steve</td>
<td>1 week</td>
</tr>
</tbody>
</table>
## STAGE 1.2 – Statistics & Reporting
Data tracking changes and report improvements.

| 1.2.1 | Gather statistics at the cooperative level, and at the individual library and venue levels | Shawn + Steve | 2 weeks |

## STAGE 1.3 – Landing Site
A dedicated site for the MAP program.

| 1.3.1 | Setup and configuration of hosting site | Shawn | 1 day |
| 1.3.2 | Web design of landing site | Devon | 1 week |
| 1.3.3 | Web development of pages About, Support Resources, Search & Results Page, and Contact Page | Shawn | 1 week |
| 1.3.4 | Mobile responsiveness and ADA compliancy testing | Shawn | 1 week |

## STAGE 1.4 – Import Existing Data
Transitioning venues, libraries, and developing a bulk upload process.

| 1.4.1 | Loading of data from existing MAP software | Shawn + Steve | 2 weeks |

## STAGE 2 – Alpha Testing

| 2.0.1 | Testing by TLN staff to ensure functional and usability requirements are met and any issues are resolved before expanding testing group. | LocalHop + TLN | 4 weeks |

## STAGE 3 – Training
Training Staff

| 3.0.1 | Train TLN Staff to add/edit destinations and passes, reserve passes from the admin and public sites, and assist patrons in retrieving/editing pass reservation details | Courtney + Sonya | 1 week |
| 3.0.2 | Train libraries in a group session to assist patrons in retrieving/editing pass reservation details | Courtney + Sonya | 1 week |

## STAGE 4 – Soft Launch
Share new MAP site with select audience to ensure functionality works as expected and meets the needs of the program.

| 4.0.1 | Beta user testing | Courtney | 4 months |

## STAGE 5 – Go Live
Publicly share the new MAP site and links with all libraries.

---

Cynergie Consulting, Inc  
mrussel@cynergie.com  
31 N Saginaw St, Pontiac, MI 48342  
(248) 952-9800
Services Available to Clients
Not only do we provide our clients with our activity pass program, but we extend additional services such as event registration & ticketing, community calendars, website calendars, room reservations, RSS feed, communication portals, ILS integration and custom websites.

Implementation Work
Please provide a list of implementation work to be completed and by whom?

<table>
<thead>
<tr>
<th>#</th>
<th>Action Plan</th>
<th>Responsible</th>
<th>Target Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>STAGE 1 – Implementation Checklist</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Existing features of our Activity Pass product.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.0.1</td>
<td>Mobile Responsive Interface/User friendly website for patrons</td>
<td>-</td>
<td>Completed</td>
</tr>
<tr>
<td>1.0.2</td>
<td>Ability to book/reserve tickets</td>
<td>-</td>
<td>Completed</td>
</tr>
<tr>
<td>1.0.3</td>
<td>Functions on multiple current and future versions of all typical standard web browsers</td>
<td>-</td>
<td>Completed</td>
</tr>
<tr>
<td>1.0.4</td>
<td>Response time should be reasonable and not leave the patron waiting</td>
<td>-</td>
<td>Completed</td>
</tr>
<tr>
<td></td>
<td>STAGE 1.1 – Product Enhancements</td>
<td>Shawn + Steve</td>
<td>3 weeks</td>
</tr>
<tr>
<td></td>
<td>Additional development of search, filter functionality, &amp; patron pass management</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date, zip code, category, and feature (kid-friendly, ADA compliance etc..).</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>1.1.2</strong> Google-like search experience across all devices that is intuitive to use and returns relevant results to the search terms entered, even when using terms that are misspelled.</td>
<td>Shawn + Steve</td>
<td>1 week</td>
<td></td>
</tr>
<tr>
<td><strong>1.1.3</strong> Separate search functionality into a quick search and advanced search option to support variety of user needs.</td>
<td>Shawn + Steve</td>
<td>1 week</td>
<td></td>
</tr>
<tr>
<td><strong>1.1.4</strong> Use a geographic search displayed on a map using Google API to see what destinations are nearby</td>
<td>Shawn + Steve</td>
<td>1 week</td>
<td></td>
</tr>
<tr>
<td><strong>1.1.5</strong> Allow patrons to print the reservation, download the pdf at reservation time, and receive that pdf in an email in the reservation confirmation.</td>
<td>Shawn + Steve</td>
<td>1 week</td>
<td></td>
</tr>
</tbody>
</table>

**STAGE 1.2 – Statistics & Reporting**  
Data tracking changes and report improvements.

| **1.2.1** Gather statistics at the cooperative level, and at the individual library and venue levels | Shawn + Steve | 2 weeks |

**STAGE 1.3 – Landing Site**  
A dedicated site for the MAP program.

| **1.3.1** Setup and configuration of hosting site | Shawn | 1 day |
| **1.3.2** Web design of landing site | Devon | 1 week |
| **1.3.3** Web development of pages About, Support Resources, Search & Results Page, and Contact Page | Shawn | 1 week |
| **1.3.4** Mobile responsiveness and ADA compliance testing | Shawn | 1 week |

**STAGE 1.4 – Import Existing Data**  
Transitioning venues, libraries, and developing a bulk upload process.

| **1.4.1** loading of data from existing MAP software | Shawn + Steve | 2 weeks |

What amount of time is needed for implementation?  
Our team will need fourteen weeks for implementation.
Who does the data entry?
Initial data entry can be done by or in support with the LocalHop Team. Organizations and destinations that will be added or removed should be managed by The Library Network or library staff for ongoing maintenance.

Will we load a spreadsheet?
Yes, we will work with you, side-by-side, to understand your current data and what can be exported or extracted from your current systems. We will then tailor our bulk upload process to import that data and create the requisite data objects: library, venue, activity pass, categories and others.

Our Approach to Program Management
As we considered your project as outlined in the following Goals and Objectives, we developed the following timeline. We believe in transparency and in working in partnership with our clients; therefore, we choose to use a Kanban board to help make our work visible so you can see the ongoing progress being made; and can report out to your project stakeholders with confidence. Your team will have access to the project Kanban dashboard. Courtney Bordeaux will host Program Management meetings bi-weekly to keep you informed and to keep your project on track. We will host bi-weekly meetings with The Library Network staff to go over status updates.

Soft Launch Options
After internal testing, we will have a testing period where The Library Network staff would be able to test the product and open it up to a beta test group if so desired.

Training for The Library Network/Michigan Activity Pass Staff
We propose a “train the trainer” approach when it comes to The Library Network staff. We will provide written documentation and video tutorials to the Michigan Activity Passes staff, library staff and patrons. Additionally, LocalHop will provide four, one-hour group training sessions for

Cynerge Consulting, Inc 31 N Saginaw St, Pontiac, MI 48342 (248) 952-9800
MAP and library staff with email support. All training will be recorded and packaged afterwards for viewing to assist you or any potential new staff in the future if needed. Any questions you have will be noted and added into these recordings as FAQ sections. For MAP and library staff specifically, training will include the following:

- We will provide the MAP staff training on how to add a library, add or modify library information, add or modify a venue, add or modify a pass and configure settings to best suit your needs.
- We will provide the MAP and library staff proper training surrounding how to add/modify reservations, resending reservation information to patrons, canceling a reservation, printing or saving a pass and how to search and find passes and/or venues.
- We will provide patrons with how-to video guides, written documentation and FAQ’s.

LocalHop is also providing optional training services to cover onboarding and marketing support, if needed. LocalHop is partnered with Sonya Schryer Norris to support our training programs.
Meet your Team

**Matt Russell, Founder and Program Manager**
Matt oversees the operations and activities of both Cynerge and LocalHop. He has over 20 years’ experience with application and website development, application modernization, and end-user support for hundreds of applications that support thousands of users. Matt earned his bachelor’s and master’s degrees from the University of Michigan-Flint. He has gone on to become certified as a Project Management Professional (PMP), a Certified Scrum Master, and Technology Business Management. As president and founder of Cynerge and president and co-founder of LocalHop, Matt is in a clear decision-making position to ensure your project goes seamlessly, and that any and all resources required for project execution will receive the appropriate attention. Matt is also on the board of Main Street Pontiac and is on the Leadership Council for the Small Business Association of Michigan.

**Courtney Bordeaux, Operations & Project Manager**
Courtney is responsible for planning and overseeing all projects to ensure they are completed in a timely fashion and within budget. She plans and designates project resources, prepares budgets, and monitors progress, in order to keep our clients informed during the course of each project. Courtney has been with the Cynerge/LocalHop team for approximately five years. She is able to effectively utilize her degree in Business Administration and Management from Adrian College to lead successful projects, budgets and teams. She has been involved with each of the projects identified within our proposal.

**Fadi Aldanal, Sales & Account Management**
Fadi manages and oversees sales operations within LocalHop and cultivates the relationships with our clients and customers to ensure each are satisfied with the products being offered and received. Fadi’s background includes a degree in Communication with a focus on Public Relations, Advertising, and Applied Communication from Oakland University. He has been a member of the LocalHop team since 2020 and has over 10 years of experience in a customer facing role. His priority is to ensure the utmost satisfaction of our clients, and to identify additional areas of opportunity or resources to help our clients solve their most pressing challenges.

**Devon Taylor, IU/UX Designer**
Devon produces all items pertaining to design and user experience. He’s responsible for enhancing customer satisfaction by improving the usability, accessibility, and experience associated with websites as well as digital applications. Overall, he prepares each project to establish both functionality and a visual aesthetics that portrays our client’s brand. Devon’s background is built upon a foundation of architecture and graphic design in which he spent learning from Lawrence Technological University before transitioning into a dual role of design and development. His years within the Cynerge/LocalHop team, has demonstrated a gratitude of knowledge within User Experiences and Human Centered Design. In continuing his progression for obtaining more insight for customers, he has gained certifications within Google

Cynerge Consulting, Inc 31 N Saginaw St, Pontiac, MI 48342
m russell@cynerge.com (248) 952-9800
Android Development, Facebooks ReactJ’s Development and Advance User Experiences presented by Google and Udacity. This continuous performance makes him an ideal candidate for your project to obtain an intuitive and qualified website and activity pass refresh.

Shawn Chapiewski, Website Developer
Shawn is a web developer who works on multiple features within the LocalHop software and is the lead developer for custom websites. Previously to joining LocalHop, Shawn worked as an IT Technician at Rochester Hills Public Library. He maintained and updated their website while collaborating with all library staff to make the site appeal to their patrons. Shawn’s background is built off of his Bachelor’s degree in Information Technology earned from Oakland University. Throughout his time with Cynerge/LocalHop, he has demonstrated great communication skills, love of learning new things, as well as working with clients to develop a solution that best suits their needs. During his time at Rochester Hills Public Library, he offered web administrative skills, patron satisfaction, and problem-solving skills over a span of three years. This continuous performance makes them an ideal candidate for your project team.

Steven Moore, Website Developer
Steven is the lead developer for LocalHop software and has over 25 years of experience in business and IT consulting, web development, database design and application integration. Prior to joining LocalHop, Steven worked for large and small IT consulting firms and acquired 15 years at a training and development company working with major automotive, education and health care industries. Steven has developed custom websites, created a custom learning management system (LMS), migrated client data, wrote custom reports, provided support to business and consumers and performed complex data and application integrations with multiple vendors. Steven earned his Bachelor’s degree in Management Information Systems from Oakland University and uses both his business knowledge and developer experience to be involved in all aspects of the LocalHop business. Steven works with other developers, UI/UX designers, support staff, testers and the product management team to prioritize and implement new product features in a timely and consistent manner.

Sonya Schryer Norris, Subject Matter Expert and Trainer
Sonya Schryer Norris spent 22 years working with library staff in Michigan and around the country, with 16 of those years serving as a consultant in Library Development for the Library of Michigan. She trained 300+ staff from over 150 libraries on website administration, eAccessibility, copyright, UX, communicating with help desks and other related skills. She has trained organizations including the Midwest Collaborative for Library Services, Gravity Works, King Media and others on instructional design. Her recorded skills tutorials were adopted by the software company Enfold Systems for inclusion in their Help Desk. Her Equity, Diversity, Inclusion & Accessibility series has been experienced by over 1,000 learners and was adopted by over 100 international library agencies. Sonya has long experience marketing educational resources specifically to library staff and advising state libraries on the best ways to market multi-format learning resources to staff in their states. Her articles have appeared in Computers in Libraries, Library Journal, and for Gale/Cengage. She presents for multiple divisions of the American Library Association and operates the Plum Librarian consulting firm.
G. TECHNICAL KNOW-HOW TO INTEGRATE OPTIONS AND LEGACY INFORMATION

Available Options with our Software
The only available option is cloud-hosting. Our software is hosted in the cloud using Amazon web services and WPEngine. While we don’t have an on-prem software solution, we do provide the ability to embed our activity pass software within our client’s websites. This is technology that we currently use to host our event calendars on their websites, which only requires copy and pasting a few lines of HTML coding without the need of any software installation.

Recommended Requirements for Hosting Options
Cynerge/LocalHop has been using WPEngine for WordPress cloud hosting services for over six years and have a high level of satisfaction with their services. We use WPEngine’s Premium Dedicated Tier which includes a service level agreement that guarantees 99.99% availability. Our hosting solution is a dedicated virtual machine within a cloud infrastructure that comes with 100GB storage and solid-state drive storage. This service is dynamically scalable in order to meet varying user loads and exceed your capacity requirements.

Methods for Integrating Current MAP Software Data
Our process is simple. We will work with you, side-by-side, to understand your current data and what can be exported or extracted from your current systems. We will then tailor our bulk upload process to import that data and create the requisite data objects: library, venue, activity pass, categories and others.
H. COSTS

H1. Cost Formula

**Three Year Cost**

<table>
<thead>
<tr>
<th>Factor</th>
<th>Unit of Measure</th>
<th>Quantity</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initial Costs</td>
<td>One-time</td>
<td>1</td>
<td>$14,725.00</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Migration Costs</td>
<td>One-time</td>
<td>1</td>
<td>$ 5,600.00</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Software Support</td>
<td>Annual</td>
<td>1</td>
<td>$ 1,200.00</td>
<td>$ 3,600.00</td>
<td>$ 3,600.00</td>
</tr>
<tr>
<td>Ongoing Maintenance Costs</td>
<td>Annual</td>
<td>1</td>
<td>$ 1,000.00</td>
<td>$ 2,200.00</td>
<td>$ 2,200.00</td>
</tr>
<tr>
<td>Product Training</td>
<td>Fixed Price</td>
<td>1</td>
<td>$ 2,400.00</td>
<td>Optional</td>
<td>Optional</td>
</tr>
<tr>
<td>LocalHop Activity Passes</td>
<td>Annual</td>
<td>1</td>
<td>$ 6,600.00</td>
<td>$13,200.00</td>
<td>$13,200.00</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td>$31,525.00</td>
<td>$19,000.00</td>
<td>$19,000.00</td>
</tr>
</tbody>
</table>

**Five Year Cost**

<table>
<thead>
<tr>
<th>Factor</th>
<th>Unit of Measure</th>
<th>Quantity</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Year 4</th>
<th>Year 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initial Costs</td>
<td>One-time</td>
<td>1</td>
<td>$14,725.00</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Migration Costs</td>
<td>One-time</td>
<td>1</td>
<td>$ 5,600.00</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Software Support</td>
<td>Annual</td>
<td>1</td>
<td>$ 1,200.00</td>
<td>$ 3,600.00</td>
<td>$ 3,600.00</td>
<td>$ 3,600.00</td>
<td>$ 3,600.00</td>
</tr>
<tr>
<td>Ongoing Maintenance Costs</td>
<td>Annual</td>
<td>1</td>
<td>$ 1,000.00</td>
<td>$ 2,400.00</td>
<td>$ 2,400.00</td>
<td>$ 2,400.00</td>
<td>$ 2,400.00</td>
</tr>
<tr>
<td>Product Training</td>
<td>Fixed Price</td>
<td>1</td>
<td>$ 2,400.00</td>
<td>Optional</td>
<td>Optional</td>
<td>Optional</td>
<td>Optional</td>
</tr>
<tr>
<td>LocalHop Activity Passes</td>
<td>Annual</td>
<td>1</td>
<td>$ 5,940.00</td>
<td>$11,880.00</td>
<td>$11,880.00</td>
<td>$11,880.00</td>
<td>$11,880.00</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td>$30,865.00</td>
<td>$17,880.00</td>
<td>$17,880.00</td>
<td>$17,880.00</td>
<td>$17,880.00</td>
</tr>
</tbody>
</table>
### Optional Services

<table>
<thead>
<tr>
<th>Factor</th>
<th>Description</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add a Library</td>
<td>Adding an additional library to the MAP program.</td>
<td>$25/library</td>
</tr>
<tr>
<td>Remove a Library</td>
<td>Removing a library from the MAP program.</td>
<td>$25 Credit</td>
</tr>
<tr>
<td>Add/Remove Destination</td>
<td>Adding or removing a destination from the MAP program.</td>
<td>$0</td>
</tr>
<tr>
<td>Marketing Relaunch Support</td>
<td>Includes 3 months pre- and 3 months post launch marketing support to increase awareness. Introduce the changes coming to MAP to the library community. Avenues will include written announcements in Michlib-l.</td>
<td>$4,000</td>
</tr>
<tr>
<td>Marketing/ Social Media</td>
<td>The LocalHop team will provide ongoing support for organic social media content and curated digital content for the MAP program. This will include five uniquely curated posts per month on selected social media platforms and one written article (800 – 1500 words in length) per quarter.</td>
<td>$2,000 per quarter</td>
</tr>
<tr>
<td>Brand Identity</td>
<td>The team will provide a refurbished logo and style guide that will boost promotion and bring awareness to an updated MAP program.</td>
<td>$3,500</td>
</tr>
<tr>
<td>Webform Signup</td>
<td>Digitalize library and destination sign-up through a custom webform uniquely catered to your needs.</td>
<td>$1,250</td>
</tr>
<tr>
<td>Training Sessions</td>
<td>Additional on-demand training sessions as needed.</td>
<td>$400/session</td>
</tr>
<tr>
<td>MAP Program Promotion</td>
<td>Training will support the potential usage and adoption of the MAP program with increasing the utilization of the service. Training will include: how to access and use low-burden marketing methods and materials to promote the program to library patrons.</td>
<td>$800/session</td>
</tr>
</tbody>
</table>
Bid Assumptions

1. We assume beta testing will take approximately 3 months as long as no issues arise.
2. Implementation is estimated at 14 weeks but will some code restructure will need to take place potentially increasing that timeline.
3. We can load spreadsheet data given all the proper data can be extracted from the current system.
I. TERMS, CONDITIONS, AND ASSUMPTIONS

I1. Effective Term of Proposal
This proposal will remain valid for a period of 210 calendar days following the proposal opening, assuming reviews will take place the week of April 11, 2022, per the Solicitation.

I2. Award and Negotiations
We will work within the Terms and Conditions to negotiate an award with The Library Network.

I3. Rejection of Proposal and Waiver of Informalities
We understand it is within The Library Network’s purview to waive informalities or reject proposals entirely.

I4. Reservations
The Cynerge Team will participate in any clarification exchanges, inspections, interviews or presentations requested. We understand these activities may be requested to support content presented in our proposal and to further illustrate our subcontracting relationships. We look forward to cooperating with your requests for information, and will do so at our own cost.

I5. Incorporating Costs
We concur. Please refer to Section H.

I6. Taxes
We concur. Please refer to Section H.

I7. Withdrawal of Proposal
We understand the only opportunity to withdrawal our offer is prior to proposal opening via email to the solicitation point of contact.

I8. Responsibility
Please let us know if any certifications, disclosures or additional information is required to determine our Responsibility.

I9. Governing Law
We are a Michigan based business and concur that Michigan law and rule govern this future contract.

I10. Public Records and Requests for Confidentiality
We would appreciate the opportunity to review and understand any FOIA requests prior to the release of information to consider and propose the potential redaction of sensitive information from our submittal.
I11. Bid Protests
We understand the proposal protest schedule and process as presented within your Terms and Conditions.
Maximize your museum pass investment with MuseumKey.

RFP RESPONSE

The Library Network
Request for Proposal
Activity Pass Software

April 8, 2022

JESSICA RATHJEN
Library Services Consultant
347-899-6153
rathjen@oclc.org
# Table of Contents

A. Cover Letter ................................................................................................. 1

B. Overall Intent and Outcomes Desired ......................................................... 2
   Needs / Exceeding TLN’s Expectations ......................................................... 2
   References ..................................................................................................... 3

C. Corporate Background ............................................................................. 4
   OCLC’s History ............................................................................................ 4
   OCLC’s Uniqueness ....................................................................................... 4
   New Developments / Software Improvements / Development Efforts ....... 5

D. Activity Pass Software Product ............................................................... 6
   MuseumKey .................................................................................................. 6

E. Implementation ........................................................................................... 8

F. Customer Support ..................................................................................... 9

G. Technical Requirements ........................................................................... 10

H. Costs .......................................................................................................... 11
   H1. Cost Formula.......................................................................................... 11
   Three Year Pricing ....................................................................................... 12
   Five Year Pricing .......................................................................................... 13
   Scope of Offer ............................................................................................. 15
   Framework Agreement ............................................................................... 16
April 8, 2022

Brigette Felix  
Shared System Librarian  
The Library Network  
41365 Vincenti Ct.  
Novi, MI 48375  
bfelix@tln.lib.mi.us

Dear Brigette,

Thank you for inviting OCLC to participate in The Library Network’s RFP for Activity Pass Software. OCLC is excited to be considered to partner with TLN in helping to maximize your museum pass investment and provide this awesome service to your patrons.

What makes MuseumKey stand out? This solution was created in partnership with public library staff. We saw and understood the pain points for public libraries circulating museum and activity pass collections for their communities. We not only wanted to create something beautiful, intuitive and easy for patrons, but for staff alike.

Although we released MuseumKey years ago, it is a growing and expanding solution. We make enhancements throughout the year using feedback from our partner libraries, including the state of Delaware and countless county libraries from coast to coast.

We also greatly value the partnerships we have created with individual member libraries within The Library Network, over the past few years, with our mobile library apps, LendingKey solution (sister solution to MuseumKey for Library of Things items), and CapiraCurbside, our curbside reservation solution.

We are happy to answer any questions relating to our written response to the RFP and share additional information about MuseumKey. Please contact Jessica Rathjen, Library Services Consultant, at 347-899-6153 or rathjen@oclc.org.

Sincerely,

Bruce A. Crocco  
Vice President, Library Services for the Americas
B. Overall Intent and Outcomes Desired

As the administrator of the Michigan Activity Pass program for the statewide MAP program, TLN considers it a matter of due diligence to periodically review services offered. We wish to contract with a single vendor for software that has: a mobile responsive interface/user friendly website for patrons, ability to print tickets and save tickets to phone, and be able to gather statistics at the cooperative level, and at the individual library and venue levels.

Please tell us how your products will meet our needs and exceed our expectations.

MuseumKey℠ offers a mobile responsive interface and a user-friendly website for patrons that connects seamlessly with your website or mobile app and provides a streamlined user experience which allows for easy navigation of the reservation calendar by either specific museum or date, while preventing reservation conflicts. Patron authentication, email notification and usage statistics are just the beginning of this next-generation solution.

MuseumKey implementation at Montclair Public Library

MuseumKey supports printable passes featuring various barcodes standards, including QR codes.

The user can also save tickets to their phone.

Detailed reporting provides statistics at the cooperative level, and at the individual library and venue levels, including transaction history for each reservation.

Staff will no longer need to manually add in museums with MuseumKey Sync, our comprehensive database of museum information and closing dates. It makes adding a new museum or providing availability information as simple as a single click. The days of staff time being consumed by working within a cumbersome and overly complicated backend will be over.
With MuseumKey you can:

- Manage your collection of museum passes in one central platform
- Provide your patrons with the freedom to plan ahead by placing reservations on passes for a specific date, as creating a hold on these items in your existing catalog does not allow for this.
- Limit the number of reservations your patrons place based on date and item.
- Automatically extend the due date of a pass if it falls on the day the library is closed
- Mark reservations as checked in or out, with optional real-time integration with your integrated library system (ILS) or library services platform (LSP).
- Validate a patron's library account and place restrictions based on user types and fines owed.

MuseumKey also integrates seamlessly with LendingKeySM, allowing you to manage all of your museum passes and Library of Things in one place.

Please provide 3 references of customers similar in scope.

Library Connection, Inc.
Sam Cook
scook@libraryconnection.info
(p) 860-937-8263

Somerset County Library System of New Jersey
Richard Loomis
rloomis@sclibnj.org
(p) 908-458-4945

Chester County Library System
Theresa Retzner
trezner@cdls.org
(p) 610-344-5287
C. Corporate Background

*Please provide a brief history of your company and the corporate vision for its future.*

Founded in 2012 by former library employees, Capira Technologies developed customized mobile apps for libraries, providing for an optimal patron experience, including state-of-the-art functionality and services, such as digital library cards, self-checkout, iBeacon integration and more. Clients include Brooklyn Public Library, Minuteman Library Network, Westchester Library System, and over 400 other public and academic libraries worldwide. In July 2020, Capira Technologies became part of OCLC®, the nonprofit library technology and research organization.

Now as part of OCLC, the team continues innovating and enhancing the Capira™ suite of products to fill critical needs of public libraries in fully supporting customers and offering new ways to engage their communities, like through museum pass reservations with MuseumKey. Together, we will continue to adapt and evolve in order to help share the knowledge and experiences contained in the world’s libraries.

OCLC is a member-driven library community. For more than 50 years, OCLC has helped libraries share knowledge and make breakthroughs possible for library users across the globe. From future-focused research to cutting-edge technology, OCLC and its members have achieved hundreds of important milestones in information service.

In 1967, a small group of library leaders believed that working together, they could find solutions to the day’s most pressing issues facing libraries. They began with the idea of combining computer technology with library cooperation to reduce costs and improve services through shared, online cataloging.

Ohio libraries came together to create a nonprofit membership organization dedicated to the public purposes of furthering access to the world’s information and reducing information costs. They proposed a major paradigm shift in library operations. The idea was to launch a computer platform and network to collaboratively build shared services and resources that lower costs while simultaneously increasing efficiency in library management. This first cooperative service would be an unparalleled effort guided by libraries to share data and workflows that they had never shared before.

Today, the idea of using technology to extend cooperation has grown into a worldwide organization in which almost 17,000 libraries, archives, and museums in more than 100 countries are members. The shared cataloging service is among the busiest in the world, enabling libraries each year to catalog more than 31 million items. Cooperative advances have expanded to help libraries better manage workflows, collection management, reference services, resource sharing and digital materials.

*What makes your company unique?*

OCLC is different. We were built not to make money, but on a foundation of sharing, collaborating, and innovating—all on behalf of and with libraries. This is true for how our products and services have been developed over time, the types of company’s we’ve acquired, and it’s true for the passionate individuals who bring their commitment to the future of libraries to work every day. (Many of them are librarians, by the way!)

Since the beginning, we’ve been a nonprofit, member-driven organization. No investors here! Every dollar goes right back in to support our work to help libraries thrive. This philosophy is built into how we work. It’s in our DNA. We don’t just provide products and resources to libraries, we listen to, develop research alongside, collaborate with, and innovate for libraries. We’re more than a vendor, we’re a partner.
What new developments are you most excited about? Can you tell us about any innovative software improvements that have just been released, soon to be released, or in development? Where are you concentrating your development efforts?

We have an active roadmap for a rolling calendar year that includes new features provided by customer input. Throughout the year, we have multiple features we aim to launch each quarter. Below are a select few of the enhancements we have on our current roadmap to be released in 2022:

- **Multilingual Support** – Users will soon be able to choose their preferred language in MuseumKey. This is part of our ongoing effort to better support our global customers and make our platform the best experience it can be.

- **Printable Pass Enhancement** – In addition to the existing barcode, numbers and text which can currently be added to a printable pass, staff will soon be able to add an additional date-specific identifier to a printable museum pass.

- **Reservation Note Field** – MuseumKey will enable a field for staff to add Notes to a reservation in the staff interface. *This enhancement was added from feedback submitted by a TLN member library, Rochester Hills Public Library, based on their LendingKey instance.*

- **Reminder Emails for Due Soon** – MuseumKey will automatically send out a reminder email that an item is due back within a number of days. *Confirmation of reservation and reminder to pick up emails are already available within MuseumKey.*

- **Auto Blocklist** – MuseumKey will include an option to automatically move a patron to the blocklist after failing to pick up a reservation a select number of times. In the blocklist, the reason for this automatic move will be noted. *We already have a manual block list available to staff to utilize within MuseumKey.*

- **SMS Module** – MuseumKey will offer an optional add-on feature to send SMS confirmation and reminder for reservations.

- **Museum Closing Dates from Google API** – Museum closing dates will be enhanced via integration with hours of operation derived from the Google Maps Platform Places API. *OCLC currently manually manages closing dates for Museums in "MuseumKey Sync."*
D. Activity Pass Software Product

Today’s library users expect a Google-like search experience across all devices that is intuitive to use and returns results that are relevant to the search terms entered. Ticketing reservation software that will serve the widely different needs of a diverse population should include the following:

- **User friendly website for patrons**
  
  MuseumKey is fully responsive and designed to guide the patron through the entire reservation process with a minimalist workflow.

![](image)

**Selecting the venue and dates for MuseumKey**

- **Functions on multiple current and future versions of all typical standard web browsers**
  
  MuseumKey functions on all current and future versions of all typical standard web browsers, including Google Chrome, Firefox, Microsoft Edge and Safari.

- **Ability to search by location/venue/destination in a variety of ways (name, zip code)**
  
  MuseumKey provides the ability to browse and limit by library location, venue, or by date.
Search screen for museum passes

- **Search facets that allow patron to limit search (by: all destinations, subject, kid friendly, ADA compliant, availability by date).**
  
  Patrons can browse availability by library location, venue, or by date. Future releases will include By Categories browsing. This feature will be expedited, if needed.

- **Advanced searching option**
  
  Advanced searching is not available at this time. Future releases will include a keyword search filter.

- **Relevance should compensate for misspelled search term without returning a wide array of results that do not appear to relate to the search term entered**
  
  Advanced searching is not available at this time. Future releases will include a keyword search filter.

- **Response time should be reasonable and not leave the patron waiting**
  
  MuseumKey is built to minimize the amount of data transmitted where possible to ensure quick loading times. The application servers are behind load balancers and clustered database instances, along with CDN services in order to ensure rapid loading of the application in patron web browsers and mobile devices.

- **Have the ability to use Google maps to be able to see what destinations are nearby**
  
  All venue addresses include a hyperlink to Google Maps for directions. The ability to directly connect to Google maps is no longer offered, as the Google Maps platform changed their API model to charge for usage.
E. Implementation:

- **What services are offered to clients?**
  We offer a simple and streamlined implementation with regular communication throughout, training to help support your team to get up and running, and a dedicated customer support team to help resolve any issues.

- **Please provide a list of implementation work to be completed and by whom.**
  As part of implementation, a new instance of MuseumKey will be created and configured by OCLC. Upon approval by the client, all existing reservations will be migrated to the new system by OCLC. Before going live, header banners, library locations, and an authentication connection to the ILS will be configured by OCLC, including limits, restrictions and custom text. All venue records, including custom descriptions, will also be created by OCLC.

- **What amount of time is needed for implementation?**
  Implementation for an instance of MuseumKey with 73 locations will take approximately 2-3 weeks.

- **Who does the data entry?**
  All data entry will be performed by us, with all settings and configurations to be reviewed by your team. You will also be able to add any additional data post launch with full access to a customized dashboard, making edits and updates simple without having to create a support ticket to make a change.

- **Can we load a spreadsheet?**
  Yes. We will provide a template for easy gathering of the information needed to begin your development. If you have exported data from another product in Excel format, we may be able to load it directly into the application database on your behalf during onboarding/implementation.

- **Will there be regular updates/meetings with TLN staff throughout the implementation process?**
  We will regularly connect throughout the implementation process to ensure a smooth transition.

- **Is a soft launch possible before the go live date of May 24, 2023?**
  Yes, a soft launch is possible before the go live date. A soft launch date will be determined once the discovery questionnaire is completed and submitted.

- **TLN is interested in training for TLN/MAP staff. Please indicate how training is offered, what information is covered, what amount of time is recommended for training as well as the cost for training.**
  We will offer training via a live webinar, which can then be offered as a recording ongoing. The training will cover how to use the site, how to pull reports. In most instances, the ease and simplicity of the platform requires very little training, but we are happy to provide the support needed.

- **Do you have written documentation? Does it include materials that can support training on the public library staff/patron level?**
  Written documentation of the staff interface and functionality is available online. Help modals are also integrated into the staff interface to explain most settings fields.
F. Customer Support

Describe your customer support approach including staffing, hours, level of expertise, resolution time.

Library staff can contact support personnel in our Dublin, Ohio headquarters via the following means:

- **Phone support**: 1-800-848-5800 is available for non-system critical issues Monday through Friday from 8:00 AM - 7:00 PM ET, and for system critical issues 24/7.

- **Email support**: We are committed to responding to all non-system critical emails within two business days. System critical issues are referred to our Service Operations Center immediately upon receipt of the email.

- **Status updates** to a Service Request can be accessed at: https://www.oclc.org/webapp/wcs/stores/servlet/UOSCPortal?storeId=10051

OCLC Customer Support is staffed from 8:00 AM - 7:00 PM ET, Monday through Friday.

**OCLC Operations Support Team** - OCLC’s computer room is staffed 24x7 by OCLC employees who monitor OCLC systems and ensure reliability for OCLC users. In the event of a system outage or problem, the OCLC computer room staff members have immediate access to product experts who will be paged to provide any necessary support. If library staff call outside of Customer Support hours, their calls will be routed to our Operations Center. Emails sent outside of these hours are distributed the next business day. If a situation presented to Operations is not a system outage, the issue will be handled the next business day by Customer Support. Outages are addressed immediately by Operations.

**Technical Support** - After implementation is completed, OCLC provides ongoing, automated searching of the local system every five minutes in order to ensure the system is responding appropriately and available to end users.
G. Technical Requirements

Please describe what options are available with your software. Is the option to locally host the software system available? What are the other hosting options? What is your recommended solution?

MuseumKey is not available to locally host and is available only as SaaS/cloud offering.

Please provide recommended requirements for all hosting options.

Please see above.

Please provide possible methods for loading of data from existing MAP software and the related technical requirements.

Data provided in a spreadsheet will be manually migrated from existing MAP software into MuseumKey, including library locations, venues, reservations and staff user accounts by the vendor.
H. Costs

The prices discussed in this proposal will be set prices for contract negotiations. The Library Network is interested in pricing for a 3 and 5 year term.

Please see the following pages.

H1. Cost Formula

Please list the factors that will be used to calculate pricing. At this time The Library Network has almost 400 public libraries and over 400 destinations participating in the MAP program. Please include the cost to add a library or destination to the program as well as discount should a library or destination leave the program.

MuseumKey pricing is based on the number of pickup locations. The addition or deletion of a library will require the group MuseumKey pricing to be reevaluated based on the revised number of pickup locations.
The Library Network

Brigette Felix
Shared System Librarian
41365 Vincenti Ct
Novi MI 48375
United States

<table>
<thead>
<tr>
<th>Item Code</th>
<th>Item</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>3000264</td>
<td>MuseumKey</td>
<td>$61,300.00</td>
</tr>
<tr>
<td></td>
<td>390 Branches</td>
<td></td>
</tr>
</tbody>
</table>

**Total** $61,300.00

**Notes**

Year 1: Pricing shown above
Year 2: $63,905.25
Year 3: $66,621.22

A 4.25% increase is included in Years 2 & 3. This pricing is only valid if The Library Network commits to the full three-year subscription period, pursuant to Section 6.1 of the Framework Agreement. For avoidance of doubt, by accepting this proposal, The Library Network will not have the ability to terminate for convenience prior to the end of the full three-year subscription period and may only terminate pursuant to Section 6.2 of the Framework Agreement.

MuseumKey pricing is based on the number of pickup locations. Invoicing frequency for the subscription fee is annual. The annual subscription dates and invoicing will be determined by the month that the service begins and/or is in full production.

---

**Signature** ___________________________ **Printed Name** ___________________________ **Date** ___________________________

For questions, please contact OCLC representative: Jessica Rathjen at rathjen@oclc.org.

This transaction is subject to the relevant OCLC Framework Agreement ("FA") and the Schedules related to each product listed on this notice, found at: [http://oclc/service-agreements](http://oclc/service-agreements), unless a signed agreement governing the transaction has been entered into by the parties.
The Library Network

Brigette Felix
Shared System Librarian
41365 Vincenti Ct
Novi MI 48375
United States

<table>
<thead>
<tr>
<th>Item Code</th>
<th>Item</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>3000264</td>
<td>MuseumKey</td>
<td>$61,300.00</td>
</tr>
<tr>
<td>390</td>
<td>Branches</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>$61,300.00</strong></td>
</tr>
</tbody>
</table>

Notes

Year 1: Pricing shown above
Year 2: $63,905.25
Year 3: $66,621.22
Year 4: $71,284.71
Year 5: $76,274.64

A 4.25% increase is included in Years 2 & 3. Years 4 & 5 will not exceed a 7% annual increase. This pricing is only valid if The Library Network commits to the full five-year subscription period, pursuant to Section 6.1 of the Framework Agreement. For avoidance of doubt, by accepting this proposal, The Library Network will not have the ability to terminate for convenience prior to the end of the full five-year subscription period and may only terminate pursuant to Section 6.2 of the Framework Agreement.

MuseumKey pricing is based on the number of pickup locations. Invoicing frequency for the subscription fee is annual. The annual subscription dates and invoicing will be determined by the month that the service begins and/or is in full production.

__________________________________________
Signature

__________________________________________
Printed Name

__________________________________________
Date

For questions, please contact OCLC representative: Jessica Rathjen at rathjen@oclc.org.

This transaction is subject to the relevant OCLC Framework Agreement (“FA”) and the Schedules related to each product listed on this notice, found at: http://oclc.service-agreements, unless a signed agreement governing the
transaction has been entered into by the parties.
SCOPE OF OFFER
The Library Network

This proposal constitutes an offer to The Library Network (the “Library”).

This offer is provided by OCLC, Inc. (“OCLC”) in response to the Library’s Request for Proposal (the “RFP”).

This proposal shall be governed by the RFP and OCLC’s Framework Agreement (included with OCLC’s proposal).

If all of the terms contained in this proposal are acceptable to the Library, please have an authorized representative accept this proposal in writing. The terms of this proposal will remain in effect for 90 days after the closing date of the RFP. Any acceptance is expressly limited to the terms of this offer, and OCLC objects to any additional terms in such acceptance, though we would consider such terms during negotiations.

If representatives of the Library wish to discuss the modification of applicable OCLC terms or the introduction of additional terms, OCLC is willing to negotiate. Before any legally binding commitments are made, however, OCLC and the Library will work out mutually acceptable contracts.

The prices given in this proposal are the result of independent OCLC action and not the result of any undisclosed collusion between or among OCLC and any third parties.

To the best of OCLC’s knowledge, no undisclosed conflict of interest between the Library and any of its employees will be caused by OCLC entering into negotiations with the Library.

Although the proposal may contain responses to the sections of the RFP dealing with specification requirements as requested, these responses are for the Library’s evaluation purposes only. OCLC assumes that the Library and OCLC shall mutually develop and agree to final project specifications consisting of the RFP specifications to the extent accepted by OCLC and any other specifications or adjustments to the specifications required by the Library and OCLC.

OCLC’s offer is contingent upon the contract being accepted by a legally competent and financially responsible entity. OCLC reserves the right to correct any errors or omissions in its proposal at any time.
Framework Agreement

<table>
<thead>
<tr>
<th>INSTITUTION NAME (&quot;Institution&quot;)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>LIBRARY NAME (if different from Institution)</td>
<td></td>
</tr>
<tr>
<td>OCLC SYMBOL (if any)</td>
<td></td>
</tr>
<tr>
<td>STREET ADDRESS</td>
<td></td>
</tr>
<tr>
<td>CITY, STATE, ZIP/POSTAL CODE, COUNTRY</td>
<td></td>
</tr>
<tr>
<td>CONTACT PERSON, JOB TITLE</td>
<td></td>
</tr>
<tr>
<td>TELEPHONE NUMBER, FAX, E-MAIL ADDRESS</td>
<td></td>
</tr>
</tbody>
</table>

**BILLING ADDRESS (IF DIFFERENT FROM ABOVE)**

| STREET ADDRESS |  |
| CITY, STATE, ZIP/POSTAL CODE, COUNTRY |  |
| CONTACT PERSON, JOB TITLE |  |
| TELEPHONE NUMBER, FAX, E-MAIL ADDRESS |  |

**Is Institution considered exempt from tax in the country in which it is located?**  
☐ Yes  ☐ No

Signatures follow on next page
SIGNATURES

By signing below, Institution: (1) acknowledges that Institution has read and agrees that the terms of this Agreement, as defined herein, shall become effective upon full execution of the Agreement ("Effective Date"); (2) warrants that it has made no unilateral changes to the terms of the Agreement since last received from OCLC; (3) orders access to the Products and Services as specified in this Agreement; and (4) warrants that it has the authority to enter into this Agreement.

<table>
<thead>
<tr>
<th>Institution</th>
<th>OCLC, Inc.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Signature:</td>
<td>Signature:</td>
</tr>
<tr>
<td>Name:</td>
<td>Name:</td>
</tr>
<tr>
<td>Title:</td>
<td>Title:</td>
</tr>
<tr>
<td>Date:</td>
<td>Effective Date:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Notice Address for Institution</th>
<th>Notice Address for OCLC:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name:</td>
<td>Name: OCLC, Inc.</td>
</tr>
<tr>
<td>Email:</td>
<td>Email: <a href="mailto:legal@oclc.org">legal@oclc.org</a></td>
</tr>
</tbody>
</table>
Section 1  Schedules Incorporated

By marking the box associated with the Products and Services to which this Agreement applies below, Institution hereby subscribes to those Products and Services selected, and agrees to the associated schedule set forth at the links below. Institution may also subscribe to Products and Services by initialing an attached schedule for that Product or Service. Those schedules located at the links associated with the selected Products or Services in the table below and/or any schedules attached hereto are hereby incorporated into this Agreement (the “Schedule” or “Schedules”).

<table>
<thead>
<tr>
<th>Products and Services Provided</th>
<th>Associated Schedule</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ WorldShare® Management Services</td>
<td>Schedule 1 - WMS</td>
</tr>
<tr>
<td>☐ WMS Sandbox</td>
<td>Schedule 1.A - WMS Sandbox</td>
</tr>
<tr>
<td>☐ WorldShare Metadata / OCLC Cataloging</td>
<td>Schedule 2 - WorldShare Metadata / OCLC Cataloging</td>
</tr>
<tr>
<td>☐ Group Catalog</td>
<td>Schedule 2.A - Group Catalog</td>
</tr>
<tr>
<td>☐ WorldCat® Discovery Services</td>
<td>Schedule 3 - WorldCat Discovery Services</td>
</tr>
<tr>
<td>☐ WorldCat® Discovery Services/FirstSearch</td>
<td>Schedule 3.A - WorldCat Discovery Services/FirstSearch</td>
</tr>
<tr>
<td>☐ WorldShare License Manager</td>
<td>Schedule 4 - WorldShare License Manager</td>
</tr>
<tr>
<td>☐ WorldShare Collection Evaluation</td>
<td>Schedule 5 - WorldShare Collection Evaluation</td>
</tr>
<tr>
<td>☐ CONTENTdm®</td>
<td>Schedule 6 - CONTENTdm</td>
</tr>
<tr>
<td>☐ EZProxy®</td>
<td>Schedule 7 - EZProxy</td>
</tr>
<tr>
<td>☐ WebDewey®</td>
<td>Schedule 8 - WebDewey</td>
</tr>
<tr>
<td>☐ OCLC WebJunction®</td>
<td>Schedule 9 - WebJunction</td>
</tr>
<tr>
<td>☐ WorldShare Interlibrary Loan Services (“ILL”)</td>
<td>Schedule 10 - WorldShare Interlibrary Loan Services (“ILL”)</td>
</tr>
<tr>
<td>☐ ILLiad</td>
<td>Schedule 10.A - ILLiad</td>
</tr>
<tr>
<td>☐ Tipasa®</td>
<td>Schedule 10.B - Tipasa</td>
</tr>
<tr>
<td>☐ WorldCat.org</td>
<td>Schedule 11 - WorldCat.org</td>
</tr>
<tr>
<td>☐ OCLC Wise (“Wise”)</td>
<td>Schedule 14 - Wise</td>
</tr>
<tr>
<td>☐ CapiraMobile™</td>
<td>Schedule 15 - CapiraMobile</td>
</tr>
<tr>
<td>☐ CapiraReady™</td>
<td>Schedule 16 - CapiraReady</td>
</tr>
<tr>
<td>☐ CapiraCurbside™</td>
<td>Schedule 17 - CapiraCurbside</td>
</tr>
<tr>
<td>☐ MuseumKey</td>
<td>Schedule 18 - MuseumKey</td>
</tr>
<tr>
<td>☐ LendingKey</td>
<td>Schedule 19 - LendingKey</td>
</tr>
</tbody>
</table>
Section 2  Scope & Construction

This “Agreement”, including the Framework Agreement and the Schedule(s) selected in Section 1, establishes the general terms and conditions for the provision of Products and Services. In case of a conflict in terms between the Framework Agreement and any applicable Schedule, the terms and conditions of the Schedule shall prevail. If Institution accepts or executes multiple agreements with OCLC for the same Products and/or Services, the order of precedence for the control of terms shall be (1) a negotiated Framework Agreement representing unique terms between OCLC and Institution, if one exists; (2) the most recently executed or accepted agreement.

Section 3  Definitions

In this Framework Agreement, except as otherwise provided, the following words and expressions shall have the meanings defined below:

3.1 Bibliographic Data means all the bibliographic data (including subject data, such as local key words and subject headings), descriptive metadata, relationship metadata and other metadata of the type stored in WorldCat.

3.2 Holdings Data means all the ownership and license data in relation to Institution’s collection (including electronic resources).

3.3 Hosted Services means the hosted services made available by OCLC which Institution may access pursuant to this Agreement. The Hosted Services are described in detail in the applicable Product Descriptions but do not include services (including API’s and the like) provided by third parties.

3.4 Institution Data means (i) the Holdings Data in relation to Institution’s collection; (ii) all the data that forms part of the library process or the internal operations of the Institution, such as circulation, patron, and acquisition data; and (iii) all other data and content that is produced, sent or reproduced through the Services by the Institution or made available to OCLC in connection with the Services.

3.5 Internal Data means Institution Data intended exclusively for internal use by the Institution, subject to the rights granted to OCLC herein.

3.6 Product Descriptions means the descriptions of the Products and Hosted Services as made available at www.oclc.org and as updated from time to time by OCLC.

3.7 Products mean the OCLC software, hardware, and other products licensed to Institution pursuant to this Agreement. The Products are described in detail in the applicable Product Descriptions but do not include products provided by third parties.

3.8 Professional Services means the services that OCLC provides to Institution under this Agreement in connection with the Products or Hosted Services, such as data migration, configuration, consultancy, support, and training.

3.9 Services mean the Hosted Services and Professional Services.

3.10 Shared Data means the Institution Data made available by Institution to the public or to third parties selected by the Institution (such as other participants or users) or that by its nature is intended for use outside the Institution’s organization, such as Bibliographic Data, Holdings Data, and other data not considered Internal Data.

3.11 Systems mean the facilities, server(s), equipment, operating software, and connectivity used to provide the Services.

3.12 WorldCat means the databases of Bibliographic Data, Holdings Data, and related files maintained by OCLC.

Section 4  Products and Services

4.1 General. OCLC will provide Institution those Products and Services to which it subscribes, in accordance with this Agreement and as described in the version of each Product or Service’s respective Product Description, active on the Effective Date. Further information can be found at https://www.oclc.org/en/services.html. Institution shall provide OCLC with the assistance and information OCLC reasonably needs to perform the Services properly or where OCLC otherwise reasonably requests. OCLC shall not be liable for any failure to perform its obligations arising from Institution’s failure to provide such assistance or information.

4.2 Modifications. OCLC may change or modify a Product or Service from time to time in its discretion. OCLC shall notify Institution should there be any material changes to the respective Product or Service by such means as reasonably determined by OCLC. Any new Product or Service functionality made available by OCLC shall be subject to this Agreement.

4.3 Support. Support services will be provided in accordance with the support service description set forth in the relevant Schedule. Further information is available at http://www.oclc.org/support/home.en.html.

4.4 Limitations. Institution shall only use the Products and Services in accordance with the terms of this Agreement and for the purposes specified in the Product Descriptions.
Section 5  Ownership and Licenses

5.1 Ownership

a) OCLC Intellectual Property. OCLC and/or its licensors or suppliers are the exclusive owners of and retain all right, title, and interest (including all copyrights, trademarks, patents, and any other proprietary rights) to the Products, Services, WorldCat, and all other materials produced or provided by OCLC. All rights not expressly granted by OCLC are reserved.

b) Institution Data. Institution, and/or its suppliers and affiliates, retains all right, title and interest (including, without limitation, all proprietary rights) to Institution Data, except for rights granted to OCLC and its affiliates under this Agreement. Institution is solely responsible for the accuracy, completeness, and legality of Institution Data. Institution is responsible for obtaining all permission and other rights necessary to provide Institution Data to OCLC. Institution will not provide OCLC with Institution Data that Institution does not have the right to provide for use in connection with the Products or Services.

5.2 Licenses.

a) Products and Services. Subject to the terms of this Agreement and the applicable Schedule(s), Institution’s license to use the Products and Services identified in the executed Schedules may be pursuant to a hosted license (for Hosted Services) or a non-hosted license (for Products). For Products paid for by Institution, OCLC grants Institution a nonexclusive, nontransferable license to install and use the Product solely for the noncommercial purposes described in the Product Description and the applicable Schedule. For Hosted Services subscribed to by Institution, OCLC will provide access to the Hosted Service, and if applicable a license to install and use any local software components of the Hosted Service, all solely for the noncommercial purposes described in the Product Description and the applicable Schedule.

b) Institution Data. Institution grants OCLC a global, non-exclusive, royalty-free, transferable and sub licensable right to use the Internal Data to the extent necessary for the provision of the Products and Services. Institution grants OCLC, OCLC participants, non-participant users, and OCLC designees a global, perpetual, non-exclusive, royalty-free, transferable, and sub- licensable right to host, reproduce, transmit, store, publish, distribute, modify, create derivative works from, and otherwise use Shared Data. Institution Data shall be supplied to OCLC in a format compatible for use with the Products and Services.

Section 6  Term and Termination

6.1 Term. This Agreement shall commence on the Effective Date and shall remain in full force and effect for the initial term specified in a pricing document, upon the expiration of which, the Agreement shall renew annually unless terminated according to Section 6.2, or if no such term is specified, the duration that Institution has access to the applicable Products or Services (the “Term”), subject to the earlier termination of this Agreement pursuant to Section 6.2 below.

6.2 Termination. This Agreement or individual Schedules may be terminated in one of the following ways:

a) By either party, effective at the end of the initial subscription period, which shall be as set forth in the agreed upon pricing document, or any renewal period, as which shall be as set forth in any renewal notice issued pursuant to Section 7.2, by providing the other party with at least 30 days’ prior written notice of its desire to not renew a Product or Service;

b) By either party if the other party becomes insolvent, makes a general assignment for the benefit of creditors, suffers or permits the appointment of a receiver for all or a substantial part of its property, is subject to any proceeding under any bankruptcy or insolvency law, or has wound up or liquidated, voluntarily or otherwise;

c) By the non-breaching party if a party commits a material breach of its obligations under this Agreement and has not cured such breach or failure within 30 days of receiving written notice from the non-breaching party. OCLC reserves the right, however, to immediately suspend Institution’s access to the OCLC Services in the event of Institution’s material breach until such time as the material breach is cured; or

d) As otherwise explicitly provided in this Agreement.

6.3 Effect of Termination. Termination of this Agreement shall terminate all Schedules, termination of a Schedule will not terminate the Agreement or any other Schedule. Upon termination of this Agreement or any Schedule, the rights granted by OCLC in the applicable Schedule or Agreement are terminated unless otherwise provided in such Schedule. After termination and upon request, OCLC will promptly return or destroy all applicable Institution Data, except however, OCLC may retain Institution Data in back-up files provided that the confidentiality and security obligations contained herein shall apply. OCLC will provide Institution access to Institution Data for 90 days after the effective date of termination, after which, OCLC shall have no obligation to maintain any Institution Data.
Section 7 Fees and Payment Terms

7.1 **Fees.** Institution shall pay the applicable charges based on their agreed upon pricing document. In the absence of an agreed upon pricing document, (i) OCLC’s prevailing price for the Products and Services shall govern; and (ii) payments shall be made to OCLC annually; such annual payments will be billed upon the beginning of the applicable subscription period and shall be paid according to the terms stated on the invoice. Fees are exclusive of any taxes and shall be paid in the currency and to the address stated on the invoice. Institution shall pay such tax to OCLC or other entity, as appropriate. Institutions exempt from taxation shall supply a valid exemption certificate upon request. Institution's failure to fully pay any fees or taxes within 60 days after the applicable due date will be deemed a material breach of this Agreement, justifying OCLC’s suspension of Products and Services.

7.2 **Price Changes.** OCLC reserves the right to change any price/fee, provided that OCLC provides Institution written notice of the change at least 60 days prior to the date the change is to become effective. Notwithstanding the foregoing, OCLC will not change any prices/fees contained in an agreed to price quote or renewal notice prior to the expiration of the quote or renewal notice.

7.3 **Non-refundable.** Institution will not be entitled to a refund of any implementation or pre-paid fees under this Agreement unless (i) OCLC terminates the Agreement or a Schedule pursuant to Section 6.2 (a), or (ii) Institution terminates the Agreement or a Schedule pursuant to Section 6.2 (c); in which event, OCLC will refund that portion of fees pre-paid by Institution corresponding to the period after termination.

7.4 **Proprietary Information.** Institution agrees that OCLC’s pricing information is proprietary to OCLC, and agrees to maintain confidentiality of such proprietary information, as well as any other information which OCLC communicates in writing to be proprietary or confidential, for 3 years from receipt by Institution. It shall not be a violation of this section to disclose information as required by applicable law (including public records acts), valid court order, or legal process.

Section 8 Disclaimer

EXCEPT AS EXPRESSLY SET FORTH IN THIS AGREEMENT, THE PRODUCTS AND SERVICES ARE PROVIDED "AS IS" AND OCLC AND ITS THIRD PARTY SUPPLIERS DO NOT MAKE ANY REPRESENTATIONS OR WARRANTIES OF ANY KIND, EXPRESS OR IMPLIED, WITH RESPECT TO THE PERFORMANCE OF THE PRODUCTS OR SERVICES, INCLUDING, BUT NOT LIMITED TO, ANY IMPLIED WARRANTY OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, NON-INFRINGEMENT OR ANY IMPLIED WARRANTY ARISING BY USAGE OF TRADE, COURSE OF DEALING OR COURSE OF PERFORMANCE. OCLC MAKES NO REPRESENTATIONS OR WARRANTIES THAT THE PRODUCTS AND SERVICES WILL ALWAYS BE ACCESSIBLE, FREE OF HARMFUL COMPONENTS, ACCURATE OR ERROR-FREE. INSTITUTION MAY INTEGRATE OCLC’S PRODUCTS AND SERVICES WITH THIRD PARTY PRODUCTS AND SERVICES. HOWEVER, IN NO EVENT WILL OCLC BE LIABLE FOR ANY LOSS ARISING OUT OF FAILURE OF SUCH THIRD PARTY PRODUCTS OR SERVICES OR OTHER EVENTS OUTSIDE OF OCLC’S REASONABLE CONTROL. ADDITIONALLY, UNDER NO CIRCUMSTANCES SHALL OCLC BE LIABLE FOR ANY LOSS ARISING OUT OF A DATA OR A SECURITY BREACH ORIGINATING FROM SUCH THIRD PARTY SOFTWARE. THIS SECTION WILL NOT APPLY TO DAMAGES THAT CANNOT BE EXCLUDED BY LAW (IN WHICH EVENT THE LIABILITY SHALL BE LIMITED TO THE FULLEST EXTENT PERMITTED).

Section 9 Privacy and Security

9.1 **Data Security.** OCLC has implemented and shall maintain commercially appropriate, reasonable and customary controls to ensure the security, confidentiality, and protection against unauthorized access to, use, or disclosure of Internal Data. Institution shall obtain and maintain all necessary consents from all users for OCLC to provide the Products and Services and for Institution’s and users’ access, monitoring, use, disclosure, and transfer of Internal Data.

9.2 **Audit.** OCLC will (i) implement administrative, physical, and technical safeguards in accordance with accepted industry practices including conducting audits in accordance with the ISO/IEC 27001 standard (or subsequent comparable standard) and (ii) as reasonably requested by Institution, provide Institution with a copy of the certificate of registration for such standard.

9.3 **Nondisclosure of Internal Data.** OCLC shall hold all Internal Data in strict confidence and with the same standard of care it uses to protect its own information of a similar nature and shall not use Internal Data for any purpose other than to provide the Service or as may be authorized in writing by Institution. OCLC shall not disclose Internal Data to any other party except: (a) to OCLC employees, agents, subcontractors and service providers, to whom Internal Data needs to be disclosed for the purpose of providing the Service; (b) as required by law, or to respond to duly authorized information requests of police and governmental authorities or to comply with any facially valid subpoena or court order; (c) to protect the rights or property of OCLC or OCLC customers, including the enforcement of OCLC agreements or policies governing Institution’s use of the Service; (d) to involve and cooperate with law enforcement or the appropriate legal authorities in investigations, and to protect Systems and OCLC's customers, or (e) as authorized by Institution in writing.
9.4 **Prohibitions.** Institution expressly warrants that it will not enter, submit, transfer, or store in the Service any of the following types of information: Social Security Numbers (or other national identification numbers), financial account numbers, credit card or debit card numbers. OCLC will have no liability, and Institution expressly releases OCLC from any liability, associated with the loss, theft, disclosure or misuse of such information.

9.5 **Unauthorized Disclosures.** OCLC will promptly notify Institution in the event of a verified breach of non-public personal data unless such breach is unlikely to result in material harm to Institution or the data subject, or as otherwise provided by law. Institution agrees that it shall be Institution’s sole responsibility to determine whether a breach is subject to state, federal or national breach notification laws and requires breach notification (“Breach Notification”). In the event that Institution determines that a breach requires Breach Notification, OCLC agrees that it will reasonably cooperate with Institution in regards to Institution’s Breach Notification obligations as specified in the applicable law, including Institution’s investigation, enforcement, monitoring, document preparation, Breach Notification requirements, and reporting. Institution shall be solely responsible for notifying all individuals, regulators, or other organizations subject to Breach Notification, however OCLC reserves the right to first review all notifications before they are sent.

9.6 **Data Processing Agreement.** To the extent Personal Data from the European Economic Area (EEA), the United Kingdom and Switzerland are processed by OCLC and/or its affiliates, the following shall apply: The terms of the Data Processing Agreement (“DPA”) at [https://policies.oclc.org/en/privacy/data-privacy-agreements.html](https://policies.oclc.org/en/privacy/data-privacy-agreements.html) are hereby incorporated by reference and shall apply if and to the extent that Institution Data includes Personal Data, as defined in the DPA. To the extent Personal Data from the European Economic Area (EEA), the United Kingdom and Switzerland are processed by OCLC and/or its affiliates, the Standard Contractual Clauses shall apply, as further set forth in and defined by the DPA. For the purposes of the Standard Contractual Clauses, Institution and its applicable Affiliates, as defined by the DPA, are each the data exporter, and Institution’s acceptance of this Agreement shall be treated as its execution of the Standard Contractual Clauses and Appendices.

---

**Section 10  Limitation of Liability**

OCLC WILL HAVE NO LIABILITY FOR ANY INDIRECT, CONSEQUENTIAL, EXEMPLARY, SPECIAL, INCIDENTAL, OR PUNITIVE DAMAGES FOR ANY MATTER ARISING FROM OR RELATING TO THIS AGREEMENT OR THE PRODUCTS AND SERVICES, INCLUDING BUT NOT LIMITED TO ANY UNAUTHORIZED ACCESS TO, OR ALTERATION, THEFT, LOSS, INACCURACY, OR DESTRUCTION OF INFORMATION OR DATA COLLECTED, STORED, DISTRIBUTED, OR MADE AVAILABLE VIA THE PRODUCTS AND SERVICES, INSTITUTION’S USE OR INABILITY TO USE THE PRODUCTS AND SERVICES, ANY CHANGES TO OR INACCESSIBILITY OF THE PRODUCTS AND SERVICES, ANY DELAY OR FAILURE OF THE SERVICES, OR FOR LOST PROFITS, OR COSTS OF PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES, EVEN IF OCLC HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. IN NO EVENT SHALL OCLC’S LIABILITY TO INSTITUTION FOR ANY REASON AND UPON ANY CAUSE OF ACTION EXCEED THE AMOUNT INSTITUTION ACTUALLY PAID OCLC FOR THE INDIVIDUAL IMPlicated OCLC PRODUCTS OR SERVICES COVERED UNDER THIS AGREEMENT OVER THE 12 MONTHS PRIOR TO WHICH SUCH CLAIM AROSE. THIS LIMITATION APPLIES TO ALL CAUSES OF ACTION IN THE AGGREGATE, INCLUDING, BUT NOT LIMITED TO, BREACH OF CONTRACT, BREACH OF WARRANTY, NEGLIGENCE, STRICT LIABILITY, MISREPRESENTATIONS, AND OTHER TORTS. FEES UNDER THIS AGREEMENT ARE BASED UPON THIS ALLOCATION OF RISK. THIS SECTION WILL NOT APPLY TO DAMAGES THAT CANNOT BE LIMITED OR EXCLUDED BY LAW (IN WHICH EVENT THE LIABILITY SHALL BE LIMITED TO THE FULLEST EXTENT PERMITTED).

---

**Section 11  Use of Products and Services**

11.1 **General.** Institution agrees not to use, and not to allow third parties including users to use the Products or Services: (a) to distribute viruses, worms, Trojan horses, corrupted files, or other items of a destructive or deceptive nature; (b) to engage in or promote any unlawful, invasive, infringing, defamatory, or fraudulent activity; (c) to violate, or encourage the violation of, the legal rights of others; (d) to interfere with the use of a Product or Service, or the equipment used to provide Products or Services; (e) to use the Products or Services, or any part thereof, in a manner that violates the terms of service of any other Products or Services; (f) to generate, distribute, publish or facilitate unsolicited mass email, promotions, advertisings or other solicitations (“spam”); (g) to alter, reverse-engineer, interfere with, circumvent, copy, or create a derivative work of, any aspect of the Product or Service (except with the express, written consent of OCLC or applicable law specifically prohibits this restriction); (h) to omit, obscure or hide from any user any notice of a limitation of warranty, disclaimer, copyright, patent, trademark, trade secret or usage limitation or any splash screen or any other terms or conditions intended to be displayed to a user by OCLC or OCLC’s supplier; or (i) to post, send, or make available software or technical information in violation of applicable export controls laws. Institution agrees that OCLC is authorized to monitor communications into and out of the System to prevent the introduction of viruses or other hostile code, to prevent intrusions, provide support, and to otherwise enforce the terms of this Agreement. Institution agrees to reimburse OCLC.
for all reasonable and verifiable costs associated with OCLC’s compliance with governmental requests relating to Institution or Institution Data, including, but not limited to, warrants, subpoenas, and judicial orders. Notwithstanding the foregoing and to the extent permitted by law and law enforcement, OCLC will make reasonable efforts to notify Institution when a disclosure of Institution Data has or is to be made.

11.2 Credentials. Institution shall exercise all commercially reasonable efforts to prevent unauthorized use of the Products and Services and is solely responsible for any and all use, including unauthorized use, of the Products and Services initiated using Institution’s API keys and/or credentials. Institution shall immediately notify OCLC of a suspected or actual loss, theft or disclosure of any credentials and of any unauthorized use of a Product or Service. Should OCLC become aware of unauthorized use of Institution’s API keys or credentials or unauthorized access to a Product or Service, OCLC may notify Institution and deactivate affected credentials. OCLC will provide Institution with administrative credentials to access and use the applicable Product or Service. Institution is responsible for authorizing user access to the Products or Services, assigning privileges, and creating, maintaining, and terminating accounts.

11.3 Enforcement by OCLC. OCLC reserves the right to: (i) investigate any violation of this Section or misuse of Products or Services; (ii) enforce this Section; and (iii) remove or disable access, screen, or edit any Institution Data that violates these provisions. Without limitation, OCLC also reserves the right to report any activity (including the disclosure of appropriate Institution Data) that it suspects violates any law or regulation to appropriate law enforcement, regulators, or other appropriate third parties. OCLC may cooperate with appropriate law enforcement by providing network and systems information related to allegedly illegal or harmful content. VIOLATION OF THIS SECTION MAY RESULT IN THE SUSPENSION OF OCLC SERVICES AND SUCH OTHER ACTION AS OCLC REASONABLY DEEMS APPROPRIATE. REPEATED OR WILLFUL VIOLATION OF THIS SECTION MAY, IN OCLC’S SOLE DISCRETION RESULT IN THE TERMINATION OF THE AGREEMENT, ANY SCHEDULE, OR OCLC SERVICE.

Section 12 Warranties

OCLC warrants that any Professional Services will be performed in a professional and workman-like manner and that, when operated in accordance with the Product Description, the Products and Hosted Services will be capable of performing substantially in accordance with the functional specifications set forth in such Product Description. If any Products or Services fail to comply with the warranty set forth above, OCLC will make reasonable efforts to correct the noncompliance provided that OCLC is given notice of the noncompliance within 30 days and OCLC is able to reproduce the noncompliance. If OCLC is unable to correct the noncompliance, Institution may terminate the Schedule for the relevant Product or Hosted Service in accordance with Section 6.2(c) and, as its sole remedy, will be entitled to a refund of an equitable portion of fees paid for the relevant Product or Hosted Service after such noncompliance was reported. OCLC and Institution each warrant that its entry into this Agreement does not violate any other agreement to which it is a party, and that its performance under this Agreement will be in conformance with all applicable laws and government rules and regulations. Institution warrants that it possesses all rights necessary to enter into this Agreement and grants the rights described in this Agreement such that OCLC will not infringe upon or otherwise violate any intellectual property rights or other rights of a third party or violate any laws by exercising the rights and licenses granted under this Agreement. To the extent permitted by law, Institution hereby indemnifies OCLC from any such claims in this respect.

Section 13 General

13.1 OCLC Membership. As a subscriber to OCLC’s Services and Products as described in this Agreement, Institution – and each library owned or operated by Institution – may be eligible for membership in the OCLC cooperative. Membership qualifications for the OCLC cooperative can be found at https://www.oclc.org/content/dam/oclc/membership/Membership-Criteria-FY21.pdf. If Institution’s subscription qualifies it as a member, Institution permits OCLC Member Relations to contact its library staff directly in separate communications, to provide new member information regarding voting and updates, Member groups, councils, and events, for OCLC Global and Regional Councils specific to Institution’s region. As a member, Institution agrees to abide by the requirements and policies applicable to OCLC members.

13.2 No Assignment. Institution may not assign, without the prior written consent of OCLC, any rights, duties, or obligations under this Agreement to any person or entity, in whole or in part.

13.3 Independent Contractors. The relationship of the parties is that of independent contractors, and no agency, employment, partnership, joint venture, or any other relationship is created by this Agreement.

13.4 Force Majeure. Neither party shall be responsible for losses or damages to the other occasioned by delays in the performance or the non-performance of any of said party’s obligations (other than the obligation to make payments when due) when caused by acts of God, acts of the other party or any other cause beyond the control of said party and without its fault or negligence.
13.5 **Non-Waiver.** A failure or delay in enforcing an obligation under this Agreement does not prevent enforcement of the provision at a later date. A waiver of a breach of one obligation does not amount to a waiver of any other obligation, and it will not prevent a party from subsequently requiring compliance with that obligation.

13.6 **Severability.** If any provisions of this Agreement shall be found by any court of competent jurisdiction to be invalid or unenforceable, the invalidity or unenforceability of such provision shall not affect the other provisions of this Agreement.

13.7 **Entire Agreement.** This Agreement and any Schedules constitute the complete agreement between the parties and supersede all prior agreements, oral and written, between the parties relating to the subject matter of this Agreement. If Institution’s accounting representatives require the use of a purchase order to facilitate payment for Products and Services contemplated in this Agreement, Institution agrees any and all terms and conditions contained in such purchase order are null and void, and do not apply to this Agreement. OCLC will provide invoices in response to purchase orders solely to facilitate payment and for the convenience of Institution; in no case, however, will OCLC’s issuance of an invoice constitute an acceptance of terms contained in a purchase order. OCLC provides Services and Products to Institution solely pursuant to this Agreement; OCLC shall never provide Services or Products pursuant to, or as a result of, a purchase order. Except as otherwise provided herein, this Agreement may not be amended or supplemented except in a writing duly executed by both parties.

13.8 **Notice.** Except as stated elsewhere in the Agreement all notices shall be in writing and shall be deemed sufficient if received by a party via e-mail to the e-mail address for such party set forth in Section 1, or by such other means as has been agreed by the parties in writing.

13.9 **Counterparts and Signatures.** This Agreement may be executed in counterparts and/or via facsimile transmission or electronic copy, any one or form of which will be deemed to constitute an original, but all of which will constitute one instrument. Any signature (including any electronic signature, symbol or process attached to, or associated with, a contract or other record and adopted by a Person with the intent to sign, authenticate or accept such contract or record) hereto or to any other contract, record, certificate, or other document related to this Agreement, and any contract formation or record-keeping through electronic means shall have the same legal validity and enforceability as a manually executed signature or use of a paper-based recordkeeping system.

### Section 14 Special Terms for Group Orders Only

Where a lead institution in a consortium (the “Group Administrator”) is ordering on behalf of itself and other consortium members, this Section applies:

14.1 **Ordering.** Group Administrator may order the Service on behalf of consortium members by completing the relevant portions of the agreed upon pricing or order document and agreeing to this Agreement. Group Administrator also orders and allocates authorizations and passwords for the Service on behalf of consortium members listed on the agreed upon pricing or order document. Group Administrator is not a buyer of the Service for resale. Any material change in group membership or group participation may result in commensurate changes in the fees for the applicable Service.

14.2 **Consortium Member's Agreement.** Group Administrator warrants, as the consortium agent, that it is authorized to and hereby binds consortium members to this Agreement and shall indemnify OCLC from all loss, expense and damage arising from a breach of such warranty. Group Administrator shall provide each consortium member with a copy of this Agreement prior to Product and Service activation. Each order for consortium members shall constitute a binding contract between OCLC and the consortium member.

14.3 **Payment by Group Administrator.** Group Administrator shall be liable for paying to OCLC all charges and applicable taxes for consortium members for the Products and Services in accordance with the terms of this Agreement.

14.4 **Non-exclusivity.** Nothing herein shall limit OCLC's right to distribute any Products or Services independent of Group Administrator.
April 8, 2022

Brigette Felix  
Shared System Librarian  
The Library Network  
41365 Vincenti Ct.  
Novi, MI 48375  
bfelix@tln.lib.mi.us  
(248) 536-3100 ext. 137 (voice)  
(248) 536-3098 (fax)

Dear Brigette,

Thank you for the opportunity to submit a proposal to continue our relationship with The Library Network and the MAP program.

It has been a privilege and a pleasure working with you and Jim over the last nine years and we would certainly love to continue doing so with a new, enhanced version of the MAP software.

Enclosed is our proposal. Please feel free to contact me with any questions.

Best regards,

Ric

Ric Bailey  
President  
Plymouth Rocket, Inc.  
508.746.4080  
rbailey@plymouthrocket.com
1. Executive Summary

The Library Network (TLN) is committed to providing the residents of Michigan with an easy and inexpensive way to visit the attractions of the state. Nine years ago, the decision was made to use web-based software to make the reservation and redemption of passes much easier. Plymouth Rocket was identified as an established company with proven software to handle pass reservations and was selected to partner with TLN to develop a custom version for Michigan.

This proposal outlines a new version of the Michigan Activity Pass (MAP) software which would allow Plymouth Rocket to enhance the staff, user and venue experience.

2. Plymouth Rocket Corporate Background and Vision

A. History: Plymouth Rocket, Inc. was founded in 2000 in Plymouth, Massachusetts and its first product was EventKeeper, a dynamic, data-driven online calendar to allow libraries to very easily keep their calendars up to date.

A few years later, in response to customer demand, we added TixKeeper, an online museum pass reservation system. TixKeeper is the underlying platform which is used by the current MAP software. Shortly after that, we developed KitKeeper, originally designed to manage Book Club kits but which is now used by many libraries to manage a “Library of Things”.

TixKeeper: TixKeeper usage has expanded over the years; it is now in use at many libraries throughout the United States to manage the reservations of passes to museums, national parks, historical sites, and other destinations.

MAP: The Michigan Activity Pass software has been used very successfully for the past nine years. It consists of 2 primary components:

(1) A custom front end, using graphics designed in cooperation with a third party, selected by TLN, and implemented by Plymouth Rocket, which allows patrons to search for available destinations either by the distance from a specified location or by area of interest. As part of the
resulting Destination List, patrons can view (a) a comprehensive map of the destination locations, (b) a link to the venue’s web site, (c) details of each pass and (d) a link to a map showing directions to a selected destination. Patrons are also shown (e) a link to the page where they can reserve the pass, if one is available.

We assume for purposes of this proposal that this front end of the MAP software continues to be desired by TLN.

2) The second component of MAP is based on the commercial-off-the-shelf TixKeeper where patrons can see the list of passes available on a particular date and choose the pass they wish to reserve.

As an aside, we just returned from the Public Library Association Conference 2022 in Portland, Oregon where it was a pleasure speaking to a number of folks from Michigan, all of whom expressed how much they liked the MAP program.

B. Corporate Vision for the Future

We continue to maintain and improve our existing products, while expanding our presence in the library market. We are working to develop new and exciting products for libraries to make it easier for staff to do their jobs and easier for patrons to find answers.

New Developments: We are working on several projects that might be of interest to Michigan.

1. **TixMaster**: Provides software for the venues / destinations that are part of a pass reservation software system. TixMaster allows destinations to scan, for instance, a MAP pass, and gather information about the library that issued the pass, the date of the reservation and when it was actually used.

   This software fills the current gap between the number of pass reservations made and the number that are actually used. This new tracking data would be tremendously useful to both the destinations, the libraries and the MAP staff.

2. **Study Room Reservations**: While not relevant as part of the MAP project this software could be very useful to many of the Michigan
libraries.

3. **KitKeeper**: Manages the reservations and distribution of book club kits, and elements in a library of things implementation. This system is currently in use by the Library of Michigan and several other libraries in Michigan.

4. **Multiple Language Support**: In partnership with the Public Library of Ottawa, Canada we are implementing a sophisticated method of providing users with the ability to view our applications in multiple languages. The system does not use Google Translation which while relatively easy, they deemed unacceptable. We are starting this project with a French alternative but the design allows for other languages.

### 3. Technical Response

Based on the RFP, we propose to deliver a version of MAP with the tried and true, successful elements unchanged and other elements added or modified as described below. Specifically, based on section A3 of the RFP, Minimum Requirements for MAP Software:

A. **Mobile Responsive Interface/User Friendly website for patrons**

Plymouth Rocket has recently created a new patron interface for TixKeeper. Please see, for example, the [Seattle, WA Museum Pass page](https://tkmars.com/?seattle) either on a phone or resized on a desktop. This new, more mobile friendly, interface will be incorporated into the next version of MAP to make the software more responsive and improve the patron experience on phones and other devices.

B. **Ability to search by location and venue**

The patron interface will remain largely unchanged unless requested by TLN, with the following exception:

The Start Location may be specified by entering not only the zip code but also any Michigan Library name or any street address.

C. **Ability to book/reserve tickets**
1. On the page showing the list of destinations the patron will see the map locating the results of the patron’s search. [RFP: Using Google maps to see what attractions are near me]

2. The entry for each destination found has:

   a. The name of the destination which is also a link to the destination’s web site.
   
   b. The distance to the destination from the patron’s start location.
   
   c. The category or categories of the destination, e.g. Camping, State Part, Activities for Children.
   
   d. A link named MORE INFO which, when clicked, displays specific information about the pass to the destination.
   
   e. A link named DIRECTIONS which, when clicked, displays, in a new window, Google Map Directions from the patron’s location to the destination.
   
   f. A link named GET PASS which, when clicked, takes the patron to the new, responsive, version of TixKeeper where the user can reserve the selected pass, print the pass, or save the pass to the user’s phone to display to the destination for admittance. [ RFP: Ability to print tickets and save tickets to phone ]

   Note: The GET PASS link may be made more obvious by either changing it to a button and/or increasing the font size. We have received some feedback requesting this change and will design the details in cooperation with TLN.

D. Administrative Features

1. Be able to gather statistics at the cooperative level, and at the individual library and venue levels.

   Based on our experience and in conjunction with TLN staff, we will create a new dashboard with whatever statistics will be most useful to cooperatives, libraries and venues.
Logins will be created initially by Plymouth Rocket and then maintained by TLN/MAP staff for each of the libraries and each of the venues. This will allow non-TLN staff to create reports of the usage statistics that are most interesting to them.

2. We will review the existing processes by which passes are added, modified and deleted in order to make the MAP system much easier to maintain.

3. Pass Allotment and Patron Authentication

In the absence of new requirements in the RFP, there will initially be 5 passes allowed per library and there will be no patron authentication using the patron’s bar code and accessing the various ILS around the state.

Plymouth Rocket supports Patron Authentication using all of the major ILS providers but, to date, this has not been desired by TLN. We would be happy to provide a quote to add the authenticating of patrons wishing to reserve a pass but it is not included as part of this proposal.

Plymouth Rocket has extensive experience with helping libraries define the criteria which control pass reservations, e.g. fees owed, age of patron, zip code of patron, etc. We can use whatever information is provided by our query to the ILS and compare that with criteria established by the library (or perhaps TLN.)

4. Examples of Tixkeeper-based Clients and Applications:

A. **Boston Public Library – Museum Passes** : Used in Boston, Massachusetts by the Main Library and 26 branches to manage the destination passes for the Greater Boston Area. The link above [https://www.bpl.org/museum-passes/] takes you to a custom landing page which has details of borrowing passes and a link to TixKeeper (“Reserve a Museum Pass”). Contact available on request.

B. **Iowa Libraries - Adventure Pass** : A collaboration of 47 Iowa libraries have utilized TixKeeper to easily configure the details and
manage the use of their destination passes. Contact available on request.

C. Seattle Public Library – Museum Passes: Used by the city of Seattle, Washington to easily configure the details and manage the use of their destination passes. Contact available on request.

5. Implementation Details

A. Implementation Work: All required work will be done by Plymouth Rocket, with design input and testing assistance from MAP staff.

B. Data entry should be minimal, initially done by Plymouth Rocket, starting with the data in the existing system and adding/subtracting libraries and venues as need. Ongoing maintenance will be the responsibility of MAP staff (with the new dashboard.)

C. We will count on regular meetings with TLN staff during the implementation phase.

D. Documentation will be included in our AnswerKeeper product for all admin/library and venue users. Specific sections may be printed as needed.

E. Training will be accomplished with web-based sessions (live and recorded) as needed to familiarize the various classes of users with the software and how to use AnswerKeeper to find solutions to specific questions.

F. A soft launch would not only be possible but is highly recommended by Plymouth Rocket.

6. Customer Support

We assume that the first line support of libraries and patrons will be done, as it is now, by TLN staff. Plymouth Rocket will typically be available as backup Monday-Friday 9 AM – 5 PM EST. Emergencies, of which we have seen very few in the last 9 years, will be handled by
Senior Staff via email or telephone when needed.

8. Technical Requirements

A. Hosting of the MAP software is done on the Plymouth Rocket servers. Recently we have been exploring ways to embed Plymouth Rocket services in a web site on the client’s server. We will investigate this option if desired by TLN.

B. If Plymouth Rocket is selected as the vendor, there will be no issues with the loading of data from the existing MAP software.

9. Costs

A. First Year Costs including TixKeeper Software Licenses, Software Design and Development, Migration, Training Materials and Training, and First Year Support:

    $16,940

B. Following Annual Cost including TixKeeper Software Licenses, and Annual Support: for Years, 2 – 5:

    $7,700

C. Total Contract Cost:

    3 years = $32,340

    5 years = $47,740
5. Summary

We believe that the partnership between TLN and Plymouth Rocket, Inc. has been a great one over the years. We have continued to be responsive to changes as requested by staff and patrons which have resulted in excellent MAP software.

We look forward to providing an enhanced version of MAP and to continuing our partnership with TLN.

Thank you.
The Library Network
Request for Proposal for Activity Pass Software

April 1, 2022

Quipu
Library focused. Library approved.

ARE YOU READY TO GET BLOWN AWAY?

<table>
<thead>
<tr>
<th>eCARD</th>
<th>ePASS</th>
<th>eRENEW</th>
<th>PITS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Giving libraries confidence through our verified online library card registration solution.</td>
<td>Create new patron experiences and new library partnerships with our flexible, online attraction pass management system.</td>
<td>Save time, reduce confusion, and increase accuracy with anytime, anywhere library card renewal.</td>
<td>An online library Patron Incident Tracking System that fosters a safe space for everyone.</td>
</tr>
</tbody>
</table>
Table of Contents

Cover Letter

Section B: Overall Intent and Outcomes Desired (p. 1)

Section C: Corporate Background (pp. 2-3)

Section D: Activity Pass Software (pp. 3-4)

Section E: Implementation (pp. 4-6)

Section F: Customer Support (pp. 7-8)

Section G: Technical Requirements (pp. 8-9)

Section H: Costs (pp. 9-10)

Section I: Terms and Conditions (p. 10)

“We value our customers and our partnerships above all else. We are dedicated to being responsive, genuine, and trustworthy in providing expertise, products, and services.”
April 1, 2022

Brigette Felix  
Shared System Librarian  
The Library Network

RE: Request for Proposal, Activity Pass Software

Dear Ms. Felix,

The Quipu Group appreciates the opportunity to respond to The Library Networks’ Request for Proposal for Activity Pass Software.

In 2011, our ePASS service was developed in conjunction with, and for, library consortium to provide a variety of controls for both the libraries and the cultural attractions involved. In short, libraries and cultural attractions work together. ePASS builds strong community relationships, increases services to your patrons, and saves valuable staff time and energy.

Quipu works closely with our clients during implementation to ensure that both client and cultural partners guidelines and policies are reflected appropriately in the online experience. Quipu Group has earned a reputation of creating stable software solutions and providing rapid and comprehensive customer service for individual libraries, library consortia, and statewide initiatives. We strive to maintain this reputation every day and to provide the best experience to every client.

Please let us know if you have any questions or if you need any further information as you complete this RFP process.

Sincerely,

Melissa Stockton  
Partner, The Quipu Group, LLC
Section B: Overall Intent and Outcomes Desired

- Please tell us how your products will meet our needs and exceed our expectations.

Response:

ePASS offers the ability to create new patron experiences and new library partnerships with its flexible, online attraction pass management system. With ePASS, your libraries can provide a quick and easy way for library patrons to reserve and use passes for local cultural venues such as museums, theaters, zoos, and historical sites via its user-friendly website and mobile-friendly, device responsive interface. The ePASS online anywhere/anytime pass management system creates passes that are available on a computer or mobile device, eliminating the need for staff intervention or patron inconvenience that comes with handling physical passes.

ePASS provides myriad levels and types of control. Individual libraries control both their local branding of the patron interface as well as which patrons are allowed to login to the service to make reservations. Cultural attractions can provide targeted offers to underserved communities. Each venue has complete control over the number and type of passes they offer, and can restrict passes based on the patron’s age, zip code, library affiliation, and more. Additionally, the quantities of available offers can be allocated (or not) as desired between participating libraries.

Of particular mention is our client-driven collaboration:

- Quipu provides, at no cost, a Google ePASS Email Discussion Group platform for our ePASS clients. We encourage them to share ideas, best practices, and tips with each other. Quipu monitors, but does not moderate the discussions; we mostly lurk, but will chime in if needed.

- Our ePASS clients initiate and run quarterly Zoom meetings with fellow ePASS clients. Similar to the email discussion group, the Zoom meetings provide a venue for sharing. Clients engage at a meaningful level and freely offer their creative software exploitations and marketing tools. Quipu is always invited and participates, which our clients always appreciate... and we appreciate them!

- Please provide 3 references of customers similar in scope.

Response:

<table>
<thead>
<tr>
<th>Discover &amp; Go</th>
<th>Explore More Illinois</th>
<th>Culture Pass NYC</th>
</tr>
</thead>
<tbody>
<tr>
<td>State of California</td>
<td>Reaching Across Illinois Library System (RAILS)</td>
<td>Brooklyn Public Library, New York Public Library, Queens Public Library</td>
</tr>
<tr>
<td>Stacie Deng</td>
<td>Jessica Barnes</td>
<td>Brendan Crain</td>
</tr>
<tr>
<td>IS Programmer / Analyst</td>
<td>Member Engagement Specialist</td>
<td>Project Manager, Culture Pass NYC</td>
</tr>
<tr>
<td><a href="mailto:stacie.deng@library.cccounty.us">stacie.deng@library.cccounty.us</a></td>
<td><a href="mailto:jessica.barnes@railslibraries.info">jessica.barnes@railslibraries.info</a></td>
<td><a href="mailto:BCrain@bklynlibrary.org">BCrain@bklynlibrary.org</a></td>
</tr>
<tr>
<td>(925) 608-7715</td>
<td>(630) 734-5181</td>
<td>(718) 230-2103</td>
</tr>
</tbody>
</table>
Section C: Corporate Background

- Please provide a brief history of your company and the corporate vision for its future.

Response:

The Quipu Group, LLC, was founded in 2005 and is based in Denver, Colorado. Quipu Group is a nationally recognized technology leader providing high quality, high value products that both inspire and empower library staff and users. Our services are personalized to meet the needs of each individual client, and the software is customized to meet the needs of the library.

Over the past 17 years, we have created custom products for libraries that focus on staff empowerment through data collection, data organization, and electronic communication that supports and promotes users’ access to library services. Quipu project successes have led to word-of-mouth growth and positive references for our company, helping us to build a client list that includes academic, special, and public libraries of all sizes, all of which are innovative and customer-centered in their services. The strong relationships and trust that we have built with our library customers led to the development of our four current products: eCARD, ePASS, eRENEW, and PITS®.

Why did we name our company Quipu? Databases represent our collective foundation in software development for libraries. A quipu, (pronounced kee-poo) is an early form of a database—a system of cords and knots attached to a main cord created by the early Inca people used to gather, track, and share numeric and social information.

Quipu is at the core of everything we help libraries to achieve. From collecting user data to storing and sharing information about museums and attractions, our searchable and secure databases ensure that libraries have confidence in our products and can connect with the information that is needed for each interaction.

The Quipu Group, LLC continues to strategically grow our client list and invest in new service offerings and product development, ensuring financial stability today and into the future.

- What makes your company unique?

Response:

The strong relationships and trust that we have built with our library customers is one of mutual respect and responsibility. We value, above all else, our commitment to customer care and being trustworthy, genuine, dedicated and responsive, as well as offering expertise for our library software and technologies. We offer high quality, high value products that inspire and empower library staff, and reflect our shared passion for the mission and democracy of libraries.

- What new developments are you most excited about?

Response:

Quipu’s eRENEW product was developed in 2020 and officially released in 2021. We partnered with three libraries for this development: two public libraries in Ontario, Canada, and one public library in California.
eRENEW frees up library staff time to support and prioritize in-person patron needs, and:

- securely and privately verifies the user’s name, identification, and address, all without requiring that users provide sensitive information, such as credit card and social security numbers.
- provides real-time access to the myriad of online resources that are available online.
- empowers users to complete anywhere, anytime library card registration and renewal, removing barriers for those who cannot visit a library in person during open hours.

eRENEW also allows libraries to build stronger relationships with existing members. By capitalizing on the need for users to update their eligibility, libraries can create library card renewal campaigns and otherwise market to customers who haven’t visited for a while.

- Can you tell us about any innovative software improvements that have just been released, soon to be released, or in development?

Response:

The development of a new administrative portal reflects the most recent update for ePASS. The new interface provides a more streamlined process for management of libraries and cultural attractions within the system.

Additionally, Quipu released an ePASS upgrade in November 2021 which included two key components: 1) the ability to sort the display order for multiple offers; and 2) improved the public display for Attractions and Venue Information, which is especially helpful for an Attraction with multiple Venues.

- Where are you concentrating your development efforts?

Response:

Quipu values and encourages client feedback and, as such, maintains a list of enhancement requests received from our clients which is carefully analyzed when planning updates and new releases. We review the list and then decide which items will be included in the next release. The current enhancement list includes items such as increasing the options available for time-specific performances, more batch updating functions, and new or improved reports.

**Section D: Activity Pass Software Product**

Today’s library users expect a Google-like search experience across all devices that is intuitive to use and returns results that are relevant to the search terms entered. Ticketing reservation software that will serve the widely different needs of a diverse population should include the following:

- User friendly website for patrons
- Functions on multiple current and future versions of all typical standard web browsers
- Ability to search by location/venue/destination in a variety of ways (name, zip code)
- Search facets that allow patron to limit search (by: all destinations, subject, kid friendly, ADA compliant, availability by date).
- Advanced searching option
- Relevance should compensate for misspelled search term without returning a wide array of results that do not appear to relate to the search term entered
- Response time should be reasonable and not leave the patron waiting
- Have the ability to use Google maps to be able to see what destinations are nearby

Response:

ePASS offers the ability to create new patron experiences and new library partnerships with its flexible, online attraction pass management system. With ePASS, your library can provide a quick and easy way for library patrons to reserve and use passes for local cultural venues such as museums, theaters, zoos, and historical sites. The ePASS online anywhere/anytime pass management system creates passes that are available on a computer or mobile device, eliminating the need for staff intervention or patron inconvenience that comes with handling physical passes.

ePASS Features

- Works for consortia or individual libraries
- User friendly website for patrons
- Supports current versions of all major browsers and two immediate past versions
- Mobile friendly, device responsive interface
- Ability to search by location (city), venue, and map view
- Online reservations (printed and mobile passes available)
- Multiple offers/passes per attraction are available
- Utilizes Google Maps to provide user with an easy visual display of venues in their area
- Efficient, effective, and reasonable response time
- Patron authentication using SIP2 protocol and ILS Patron APIs
- Administration can be centralized or shared with venues and other libraries
- Attractions can limit the number of passes for the system and for individual library card holders
- Robust reporting and statistical information at cooperative, individual library, and venue levels
- Each venue has complete control over the number and type of passes they offer, and can restrict passes based on the patron's age, zip code, library affiliation, and more.
- Libraries control access: ePASS can use the API for your ILS to determine who can access the system. Access can be restricted by patron age, zip code, patron type, and more.
- Cultural Partners Control Pass Availability: ePASS provides a variety of settings for each partner Attraction and each Offer that is made available. Offers can be limited by date range, days of the week, and frequency.
- Branding for Libraries and Attractions: The public interface can be branded, displaying logos and other images specific to your service. Passes can be customized and include images and logos as well as information on any special programs or exhibits.

Section E: Implementation

- What services are offered to clients?

Response:

Above and beyond the identified implementation work identified below, Quipu provides multiple webinar-based administrative training sessions and support throughout the entirety of the installation process. Once the
installation is complete, Quipu remains available at all times for additional training and support based on a client’s request.

- Please provide a list of implementation work to be completed and by whom.

Response:

<table>
<thead>
<tr>
<th>Activity</th>
<th>Responsible Party/Parties</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initial Site Setup</td>
<td>Quipu</td>
</tr>
<tr>
<td>Determination of Service Name/Creation of Service Logo</td>
<td>TLN</td>
</tr>
<tr>
<td>Setup Authentication for Libraries</td>
<td>Quipu and TLN</td>
</tr>
<tr>
<td>Create Attraction Records</td>
<td>Quipu and TLN</td>
</tr>
<tr>
<td>Create Offers for each Attraction</td>
<td>Quipu and TLN</td>
</tr>
<tr>
<td>Customize Pass</td>
<td>Quipu and TLN</td>
</tr>
</tbody>
</table>

- What amount of time is needed for implementation?

Response:

The time required for implementation can be as short as one month but usually averages 2-3 months. Once the Agreement is fully executed, a “Getting Started” meeting will be planned. During this initial meeting, we will discuss the implementation process and determine a timeline for the project. Quipu will also complete the technical setup for TLN and make the site available to TLN/MAP staff immediately.

- Who does the data entry?

Response:

TLN is responsible for any data entry required during implementation and ongoing management of the service. The amount of data entry required will depend on the amount and types of data that can be migrated from your current system. The first stage of the implementation project will include a review of the available data and a determination of which fields and information can be migrated into ePASS.

- Can we load a spreadsheet?

Response:

In the past, we have loaded spreadsheets to populate the library profiles in the system; however, it will depend on the information you have available as to how much of the library profile can be completed with a load. For example, the authentication section of the profile requires that library-specific information be entered.

We are willing to work with you to determine if there is a way to load information for your Attractions and Offers into ePASS. We would need to create a map for the migration of the data and investigate how to translate your current fields into ePASS fields. A one-time migration fee is included in the cost section of this proposal.
- **Will there be regular updates/meetings with TLN staff throughout the implementation process?**

  **Response:**

  Regular meetings can be held during implementation with your implementation manager, Melissa Stockton. The frequency and content of meetings is unique to each client. During the initial stages of the project, we will discuss the TLN needs in this area.

- **Is a soft launch possible before the go live date of May 24, 2023?**

  **Response:**

  Once the system is fully configured, you will decide when and how the service will be released to the public. We usually recommend a soft launch so that staff has a chance to gain some experience with the service before it is made available to everyone. The timeline for the launch of the service would be primarily determined by the contract negotiations timeline as well as the migration project. The project schedule described in this RFP (Section A4) is reasonable and attainable.

- **TLN is interested in training for TLN/MAP staff. Please indicate how training is offered, what information is covered, what amount of time is recommended for training as well as the cost for training.**

  **Response:**

  Training is included in the setup fee for ePASS and is accomplished via webinar. We configure our training to fit the needs of the client. The total training time is generally between 4-6 hours. Training sessions usually include the following topics, and the number of sessions is flexible.

  - Setting up and troubleshooting library authentication
  - Global settings, users, and overall look and feel
  - Setting up and managing Attractions
  - Creating and managing Offers
  - ePASS Reports
  - Managing Reservations

- **Do you have written documentation? Does it include materials that can support training on the public library staff/patron level?**

  **Response:**

  The Quipu Group offers extensive written documentation to support training on multiple types of administrative activities. Documents include: 1) *Administration Guide*; 2) *Attraction Guide*; 3) *Library Guide*; and 4) *ILS Authentication Guide*. Also provided are three video tutorials: 1) *Create Attraction*; 2) *Create Offer*; and 3) *Create Offer for a Consortium*. Quipu documentation focuses on the administrative interface and not the public interface. With Quipu’s assistance, our clients create their own public interface training documents. As indicated earlier in this proposal, our ePASS clients routinely engage in the sharing of marketing and training materials.
Section F: Customer Support

- Describe your customer support approach including staffing, hours, level of expertise, resolution time.

Response:

Quipu Group prides itself on providing excellent customer support. Our reputation for quick and thorough support at all levels, ranging from general customer support to technical resolutions, is highly valued by our clients. Quipu Group provides support during normal business hours, Monday through Friday, 8:00 am to 5:00 pm Mountain Time, with a two (2) business-day service level response (SLA) time. The Quipu Group, LLC provides support for customers via phone, fax, email, and mail-in support. Emergency support outside of normal business hours is available at any time by phone and email.

In a recent Net Promoter Score (NPS) survey, Quipu customers ranked us at +78. An NPS of +70 or more places Quipu in the list of top customer-centric companies, achieving ‘world class’ status. This puts us in good company, alongside Nordstrom +76 and Costco +78, both of which rank at the top of customer satisfaction for companies in the United States.

Customer testimonials include:

"ePASS allowed us to realize our dream to create a statewide service to deliver cultural experiences to library cardholders." Stacie Deng, IS Programmer / Analyst, Contra Costa County Library, CA

"Quipu staff are very friendly and easy to work with. They are proactive in communicating any planned maintenance that could impact customer access are responsive to questions and concerns." Jennifer Hoffman, Manager of Books and Borrowing at Denver Public Library, CO

Our Team

The Quipu Group, LLC was formed in 2005 out of a shared belief that libraries are fundamental to our democracy. Having designed products and services for many years, together and individually, “the folks,” Melissa Stockton, Robert Anderson, and Scott Stockton, knew they could support the mission of libraries by creating products to solve problems that library staff and library users faced every day.

Today, we remain a company of three partners, focused on business development, financial success, state of the art technology, product development and design, and superior support and service.

Robert Anderson directs business development and finances for The Quipu Group, LLC and also completes product development and design for eCARD, ePASS, and eRENEW. In 1995, he began developing software for Concord/EFS, a merchant bank credit and debit card processor. After a short while in banking, Robert joined The UnCover Company, where he initially focused on enhancing and streamlining their existing article delivery system software and moved on to redevelop this software for Y2K compatibility. The experience of supporting libraries through developing great software proved to be challenging and fulfilling, and aligned with Robert’s lifelong interest of making a difference through his professional contributions. Robert went on to work with LBT Technical Services and the Colorado Alliance of Research Libraries, implementing Prospector Resource Sharing technologies for the State of Colorado and developing a custom Prospector INN-Reach Connector that allowed more libraries to participate. He also developed the GoldRush ERM system, alongside his friends and colleagues, Melissa and Scott Stockton.
Melissa Stockton serves as the chief librarian for The Quipu Group and also directs sales, marketing, and support operations for the company. Melissa holds an undergraduate degree in psychology at Oregon State University and an MLIS from the Texas Woman’s University, where she developed a strong belief in the power of libraries, and the necessity of providing unfettered access to information in order to support critical thinking, create discourse, and build knowledge within our communities. She began her library career working with library technologies and in consortia – first at the Association of Higher Education of North Texas, then at AMIGOS Library Services. Melissa then moved to Colorado to work with The CARL Corporation and later The UnCover Company, where she held several roles, the last being Manager of Technical Operations. In 1997, Melissa began working with the Colorado Alliance of Research Libraries, completing project management, managing support, and coordinating technology implementations for Alliance member libraries across the States of Colorado and Wyoming. Melissa was key in guiding the design and development of GoldRush, the Electronic Resource Management (ERM) system developed and sold by the Alliance. Melissa began working at Regis University in Colorado in 2003 before leaving to start The Quipu Group, LLC.

Scott Stockton acts as The Quipu Group’s system administrator, completing hardware and software upgrades and managing Quipu products and services databases. He also completes product development and design for PITS®. Scott’s accomplishments reflect a broad group of interests, both academically and artistically. He holds undergraduate degrees in Philosophy and English and an MLIS from the Texas Woman’s University. Scott built his library and technology expertise through his work in his University’s IT division, work in libraries, with library vendors, at library consortia, as well as in museums. These experiences allowed him to manage and complete many enterprise-level library IT projects, including telecommunications migrations, migrations from line-mode terminals to desktop computers, creating digital archives for library special collections, and designing and creating software systems to aid in disaster recovery. The project Scott is most proud of from his work prior to starting The Quipu Group, LLC, is completing software development to support the Denver Public Library’s collection of digitized photographs, the Photoswest project.

Section G: Technical Requirements

Please describe what options are available with your software. Is the option to locally host the software system available? What are the other hosting options? What is your recommended solution?

Response:

ePASS is only offered as a hosted service.

Please provide recommended requirements for all hosting options.

Response:

Browsers are required for both the public and administrative interfaces to ePASS.
Please provide possible methods for loading of data from existing MAP software and the related technical requirements.

Response:

At this time, Quipu can only provide some general comments in this area. We would need to talk with you about the data you have now and the format(s) you have available. We would then need to determine if the data can be mapped to those utilized in ePASS. We would need to determine which fields could be logically transferred and which could not. TLN staff may be required to do some data massaging to ensure that the information will be accepted by ePASS. Spreadsheets may be used; however, if there are other formats available, another format may be preferred. Quipu cannot guarantee that all of the current MAP data can be migrated into ePASS; however, we will work with TLN/MAP staff to load as much data as possible. A one-time migration fee is included in the cost section of this proposal.

Section H: Costs

The prices discussed in this proposal will be the set prices for contract negotiations. The Library Network is interested in pricing for a 3 and 5 year term.

Response:

One-time Migration Cost -- $5,000
- Attraction Data
- Offer Data

3-YEAR TERM
Setup (one-time fee): $5,000
Annual Maintenance: $9,957 (retail)
Annual Maintenance: $9,459 (5% discount for 3-year contract)

<table>
<thead>
<tr>
<th>Cost</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Setup</td>
<td>$5,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Annual Maintenance</td>
<td>$9,459</td>
<td>$9,459</td>
<td>$9,459</td>
</tr>
<tr>
<td>TOTAL</td>
<td>$14,459</td>
<td>$9,459</td>
<td>$9,459</td>
</tr>
</tbody>
</table>

5-YEAR TERM
Setup (one-time fee): $5,000
Annual Maintenance: $9,957 (retail)
Annual Maintenance: $8,961 (10% discount for 5-year contract)

<table>
<thead>
<tr>
<th>Cost</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Setup</td>
<td>$5,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Annual Maintenance</td>
<td>$8,961</td>
<td>$8,961</td>
<td>$8,961</td>
</tr>
<tr>
<td>TOTAL</td>
<td>$13,961</td>
<td>$8,961</td>
<td>$8,961</td>
</tr>
</tbody>
</table>
**H1. Cost Formula:** Please list the factors that will be used to calculate pricing. At this time The Library Network has almost 400 public libraries and over 400 destinations participating in the MAP program. Please include the cost to add a library or destination to the program as well as discount should a library or destination leave the program. All prices should be supplied including initial costs, migration costs, software support, and ongoing maintenance costs. If additional services, not requested by this proposal, are being recommended by the bidder, they must be listed separately and not figure into the total.

Response:

The annual maintenance fee for ePASS is calculated using the service area population of the libraries involved in the service. The annual maintenance costs in this proposal are based on a total service area population of 1,323,775. The annual maintenance cost would change as libraries join or leave the service. The number of attractions, offers, and administrative users does not affect the annual cost.

**Section I: Terms and Conditions**

Response:

Quipu Group has reviewed and agrees to the items in Section I: Terms and Conditions. If awarded the bid, Quipu will work with TLN to produce a contract that is agreeable to both parties.
The Library Network
Request for Proposal for Activity Pass Software

Quipu Group Response – Updated Section H: Costs
April 11, 2022

Section H: Costs

- The prices discussed in this proposal will be the set prices for contract negotiations. The Library Network is interested in pricing for a 3 and 5 year term.

Response:

The pricing below is for the State of Michigan, covering a total population count of 9,842,571.

One-time Migration Cost -- $5,000
- Attraction Data
- Offer Data

3-YEAR TERM
Setup (one-time fee): $5,000
Annual Maintenance: $33,804 (30% discount for 3-year contract)

<table>
<thead>
<tr>
<th>Cost</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Setup</td>
<td>$5,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Annual Maintenance</td>
<td>$33,804</td>
<td>$33,804</td>
<td>$33,804</td>
</tr>
<tr>
<td>TOTAL</td>
<td>$38,804</td>
<td>$33,804</td>
<td>$33,804</td>
</tr>
</tbody>
</table>

5-YEAR TERM
Setup (one-time fee): $5,000
Annual Maintenance: $28,975 (40% discount for 5-year contract)

<table>
<thead>
<tr>
<th>Cost</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Year 4</th>
<th>Year 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Setup</td>
<td>$5,000</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Annual Maintenance</td>
<td>$28,975</td>
<td>$28,975</td>
<td>$28,975</td>
<td>$28,975</td>
<td>$28,975</td>
</tr>
<tr>
<td>TOTAL</td>
<td>$33,975</td>
<td>$28,975</td>
<td>$28,975</td>
<td>$28,975</td>
<td>$28,975</td>
</tr>
</tbody>
</table>

- H1. Cost Formula: Please list the factors that will be used to calculate pricing. At this time The Library Network has almost 400 public libraries and over 400 destinations participating in the MAP program. Please include the cost to add a library or destination to the program as well as discount should a library or destination leave the program. All prices should be supplied including initial costs, migration
costs, software support, and ongoing maintenance costs. If additional services, not requested by this proposal, are being recommended by the bidder, they must be listed separately and not figure into the total.

Response:

The annual maintenance fee for ePASS is calculated using the service area population of the libraries involved in the service. The annual maintenance costs in this proposal are based on a total service area population of 9,842,571 for the State of Michigan. If a large number of libraries were to leave the service, the cost would decrease, and Quipu would discuss the new pricing and discount levels with TLN before making any changes.