

CONTRACT APPROVAL FORM

(Contract Management Use only)

CONTRACT TRACKING NO.

Cm 2841

CONTRACTOR INFORMATION

Name: INNOVATIVE INTERFACES INCORPORATED

Address: 11803 RUE BEAUJON CT TOMBALL TX 77377
City State Zip

Contractor's Administrator Name: CARRIE PEARSON Title: REGIONAL SALES EXECUTIVE

Tel#: 281-251-9289 Fax: _____ Email: carrie.pearson@iii.com

CONTRACT INFORMATION

Contract Name: POLARIS ILS SOFTWARE Contract Value: \$40,800.00

Brief Description: INTERGRATED LIBRARY SOFTWARE; MAINTAINS AND ALLOWS LIBRARY BRANCHES TO COMMUNI IN REAL TIME .

Contract Dates : From: 03/19/2020 to 03/19/2021 Status: New Renew Amend# WA/Task Order

How Procured: Sole Source Single Source ITB RFP RFQ Coop. Other _____

If Processing an Amendment:

Contract #: _____ Increase Amount of Existing Contract: _____

New Contract Dates: _____ to _____ TOTAL OR AMENDMENT AMOUNT: _____

APPROVALS PURSUANT TO NASSAU COUNTY PURCHASING POLICY, SECTION 6

- | | | | |
|----|---|-------------------------|---|
| 1. | <u><i>Dawn Postwick</i></u>
Department Head Signature | <u>3/31/20</u>
Date | <u>LIBRARIES</u>
Submitting Department |
| 2. | <u><i>SW</i></u>
Contract Management | <u>4/8/2020</u>
Date | <u>01711571-552646</u>
Funding Source/Acct # |
| 3. | <u><i>M</i></u>
Office of Management & Budget | <u>4/15/20</u>
Date | |
| 4. | <u><i>[Signature]</i></u>
County Attorney (approved as to form only) | <u>4/15/20</u>
Date | |

Comments: _____

COUNTY MANAGER – FINAL SIGNATURE APPROVAL

[Signature] 4/15/20
Michael Mullin Date

RETURN ORIGINAL(S) TO CONTRACT MANAGEMENT FOR DISTRIBUTION AS FOLLOWS:

- Original: Clerk's Services; Contractor (original or certified copy)
- Copy: Department
Office of Management & Budget
Contract Management
Clerk Finance

INNOVATIVE INTERFACES INCORPORATED
MASTER PROFESSIONAL SERVICES AGREEMENT

This Master Professional Services Agreement ("Services Agreement") is entered into by and between Innovative Interfaces Incorporated., a California corporation ("Innovative"), and the party identified as Client below ("Client"), as of the "Effective Date" also set forth below.

Client	Nassau County Library
Address	25 N 4th St Fernandina, FL 32034-4123
Effective Date	March 19, 2020
License Agreement Date	March 19, 2020

1. **Definitions.**

- a. "GTCs" means the Innovative Interfaces Incorporated Master Professional Services Agreement General Terms and Conditions in Exhibit A.
- b. "SOW" means one or more Statements of Work attached as an exhibit hereto and executed by the parties hereto from time to time on or after the Effective Date.

2. **General.** Innovative and Client agree that this Services Agreement is a binding agreement between the parties and is governed by the GTCs, which are made a part hereof. This Services Agreement, the GTCs and all other exhibits, schedules and terms and conditions referenced by or in this Services Agreement or the GTCs together constitute the "Agreement." Client acknowledges and agrees that it has had the opportunity to review the Agreement, including without limitation, the GTCs, prior to the execution of this Agreement. Innovative recommends that Client print a copy of each component of this Agreement for Client's records. Unless otherwise specified, capitalized terms in this Services Agreement have the same meaning as those in the GTCs. This Agreement is governed by and interpreted in accordance with the internal substantive laws of New York, without regard to any other laws that would require the application of the laws of another jurisdiction. Application of the U.N. Convention on Contracts for the International Sale of Goods is hereby excluded.

EXHIBITS TO SERVICES AGREEMENT

A	General Terms and Conditions
B	Statement(s) of Work
C	Pricing Exhibit

[Signature page follows]

In witness whereof, the parties have executed this Agreement by their duly authorized representatives as of the Effective Date.

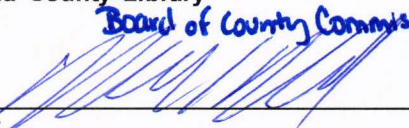
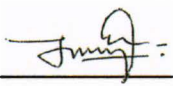
Client	Innovative
Nassau County Library Board of County Commissioners	Innovative Interfaces Incorporated
By: 	By: 
Name: Michael S. Mullin	Name: Akin Adekeye
Title: County Manager	Title: EVP, Legal & Business Development
Date: 4/19/2020	Date: March 19, 2020

Exhibit A
Master Professional Services Agreement
General Terms and Conditions

The parties agree that their contractual relationship with respect to the Services will be governed by the terms and conditions of (1) this Master Professional Services Agreement General Terms and Conditions ("GTCs"), (2) the applicable Innovative Interfaces Incorporated Master Professional Services Agreement(s) (each, a "Services Agreement"), and (3) all other applicable exhibits, schedules and terms and conditions referenced by or in the GTCs and Services Agreement(s). Each Services Agreement, together with the terms and conditions of these GTCs and all applicable exhibits or schedules incorporated by reference or referenced therein will constitute and be construed as a separate agreement. Unless otherwise specified, capitalized terms in these GTCs have the same meaning as those in the Services Agreement.

1. Scope and Performance of Services.

- a. Each SOW will detail (i) the requirements for implementation of the Software (as defined below) or such other professional consulting services as the parties may mutually agree (the "Services"), and (ii) any tangible work product or other deliverables to be provided to Client by Innovative in conjunction with the Services ("Work Product"), each of which is subject to the terms and conditions set forth in this Agreement. Any such SOW, when executed by the parties, will be deemed incorporated into this Agreement and made a part hereof for all purposes. Innovative will provide the Services on the terms contained in this Agreement. The term "Software" has the meaning assigned in that separate License Agreement between the parties dated as of the License Agreement Date identified in the Services Agreement.
- b. Client will be deemed to have accepted the Services as billed on a time and material basis unless otherwise specified in the applicable SOW.
- c. Innovative is permitted to, at its sole cost and expense, subcontract the performance of some or all of the Services provided that (i) Innovative's subcontractor agrees in writing to abide by the terms of this Agreement, and (ii) Innovative remains fully responsible for the performance of such subcontractor in accordance with the terms hereof. In performing any Services at Client's site, Innovative's and its subcontractors' personnel (collectively, the "Consulting Personnel") must adhere to all reasonable personal conduct and security policies of Client provided in writing to Innovative in advance. Unless otherwise agreed to by both parties, the Consulting Personnel will observe the working hours and holiday schedules of Client while working on Client's premises.
- d. Although Innovative will perform much of the Services at its offices with its equipment, in order to facilitate the performance of the Services, Client will make available in a timely manner, at no charge to Innovative, all facilities, programs, files, equipment, documentation, test data, sample output, or other information and resources reasonably required by Innovative for the performance of the Services ("Client Resources"). Innovative and its subcontractors are hereby granted a nonexclusive, non-transferrable, non-sub-licensable, fully paid-up license to use the Client Resources during the term of this Agreement for the sole purpose of performing the Services. Innovative will not be liable for any damages related to delays caused by Client's failure to fulfill the foregoing obligations.

2. **Change Orders.** The parties may make changes to the Services specified in an SOW by executing a mutually agreeable "Change Order" that sets forth (i) a description of the change(s), and (ii) the price and payment terms (if any) for the change(s). Once so approved, the Change Order will constitute a formal amendment to the applicable SOW, and will be deemed incorporated into this Agreement and made a part hereof for all purposes.

3. Proprietary Rights and Ownership.

- a. All Intellectual Property Rights (as defined below) in the Services and Work Product provided or made available to Client by Innovative hereunder (including all improvements, enhancements, modifications or updates) ("Innovative Products") will remain the exclusive, sole and absolute property of Innovative or the third parties from whom Innovative has obtained the right to use the Innovative Products. Intellectual property created by Innovative pursuant to this Agreement, or any other party at the request or direction of Innovative, will be owned by Innovative. "Intellectual Property Rights" means any and all intellectual property rights existing from time to time under any law or regulation, including without limitation, patent law, copyright law, semiconductor chip protection law, moral rights law, trade secret law, trademark law, unfair competition law, publicity rights law, or

privacy rights law, and any and all other proprietary rights, and any and all applications, renewals, extensions and restorations of any of the foregoing, now or hereafter in force and effect worldwide. During the term of this Agreement, subject to the terms and conditions set forth herein, Client will have a personal, non-transferable, non-exclusive, right and license to use the Work Product solely for the Software and internal business purposes of Client. Client will at all times retain all intellectual property rights in all Client Data (as defined in the License Agreement) and any proprietary information and materials provided by Client in connection with the Services provided hereunder.

- b. For purposes of this Agreement, as between Innovative and Client, any intellectual property in the Innovative Products to the extent owned by any third party will be and remain the exclusive property of such third party.
- c. Client acknowledges that Innovative is engaged in the process of continuously improving its products which provide software solutions to manage libraries for a wide variety of clients and that Innovative will continue these activities. Nothing in this Agreement will be deemed to preclude or limit Innovative from using intellectual property developed in the provision of the Services hereunder and/or developing any products, end-user services, or other deliverable materials for itself or other clients, so long as such services and/or products do not incorporate Client's Confidential Information or Client Data.
- d. If, in the course of receiving the Services, Client Data is provided by Client or its vendors to Innovative, such Client Data will be managed in accordance with the License Agreement.

4. Fees; Expenses; Payment Terms.

- a. In consideration for the Services, Client agrees to pay the fees set forth in each applicable SOW or Pricing Exhibit (the "Fees"). Additionally, Client will be responsible for all reasonable out-of-pocket costs and expenses (e.g. travel, copying and courier services) incurred by Innovative in its performance of this Agreement, which will be agreed to in advance and included in the applicable, mutually agreed Statement of Work.
- b. All Fees and expenses will be billed up to twice monthly in arrears or as may otherwise be specified in the applicable SOW or Pricing Exhibit. All Fees, expenses and any other amounts owing under this Agreement are due and payable on the terms set forth in the Pricing Exhibit. All amounts stated herein and all Fees determined hereunder are in U.S. dollars.
- c. All Fees are exclusive of all taxes and similar fees now in force or enacted in the future or imposed on the delivery of the Services, all of which Client will be responsible for and will pay in full, other than taxes based on Innovative's net income. Client will provide Innovative its state-issued Direct Pay Exemption Certificate (or equivalent certificate), if applicable, upon execution of this Agreement. In the event an applicable taxing authority, as a result of an audit or otherwise, assesses additional taxes for goods or services sold under this Agreement at any time, Client and not Innovative, will be solely responsible for payment of such additional taxes and all costs associated with such assessment, including without limitation, interest, penalties and attorney's fees. Additionally, should Client be required under any applicable law or regulation, domestic or foreign, to withhold or deduct any portion of the payments due to Innovative hereunder, then the sum due to Innovative will be increased by the amount necessary to yield to Innovative an amount equal to the sum Innovative would have received had no withholdings or deductions been made.
- d. Any invoices not paid when due will accrue interest at a rate of 1% per month or the maximum rate permitted by law, whichever is greater.

5. Limited Warranty.

- a. Innovative warrants, solely for the benefit of Client, that all Services rendered pursuant to this Agreement will be performed in professional manner consistent with industry practices. Innovative agrees to re-perform any Services not in compliance with this warranty brought to its attention within thirty (30) days after those Services are performed.
- b. Innovative warrants, solely for the benefit of Client that for a period of 30 (thirty) days after delivery, the Work Product delivered will perform in accordance with the specifications contained in the applicable SOW. Innovative agrees to correct any such Work Product not in compliance with this warranty brought to its attention within the foregoing warranty period.

- c. The exclusive remedy of Client under the limited warranties set forth in Sections 5(a) and 5(b) are set forth in Sections 5(a) and 5(b), respectively.
- d. EXCEPT FOR (i) THE WARRANTIES EXPRESSLY STATED ABOVE IN THIS SECTION AND (ii) ANY WARRANTY, REPRESENTATION OR CONDITION TO THE EXTENT THE SAME CANNOT BE EXCLUDED OR LIMITED UNDER APPLICABLE LAW, INNOVATIVE AND ITS AFFILIATES, AGENTS, SUBCONTRACTORS AND SUPPLIERS MAKE NO REPRESENTATIONS OR WARRANTIES, AND EXPRESSLY DISCLAIM AND EXCLUDE ANY AND ALL WARRANTIES, REPRESENTATIONS AND CONDITIONS, WHETHER EXPRESS OR IMPLIED, WHETHER ARISING BY OR UNDER STATUTE, COMMON LAW, CUSTOM, USAGE, COURSE OF PERFORMANCE OR OTHERWISE, INCLUDING, WITHOUT LIMITATION, ANY IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, TITLE OR NON-INFRINGEMENT. WITHOUT LIMITING THE FOREGOING, INNOVATIVE AND ITS AFFILIATES, AGENTS, SUBCONTRACTORS AND SUPPLIERS DO NOT WARRANT, AND EXPRESSLY DISCLAIM ANY REPRESENTATION OR WARRANTY, THAT THE SOFTWARE OR OTHER DELIVERABLES PROVIDED BY OR ON BEHALF OF INNOVATIVE WILL SATISFY CLIENT'S REQUIREMENTS OR THAT THEIR USE OR OPERATION WILL BE ERROR OR DEFECT-FREE OR UNINTERRUPTED OR AVAILABLE ON THE INTERNET, OR THAT ALL PRODUCT DEFECTS WILL BE CORRECTED. EXCEPT FOR THE EXPRESS WARRANTIES IN SECTIONS 5(a) AND 5(b), THE SERVICES AND WORK PRODUCT ARE PROVIDED "AS IS," WITH ALL FAULTS AND WITHOUT ANY GUARANTEES REGARDING QUALITY, PERFORMANCE, SUITABILITY, TIMELINESS, SECURITY, DURABILITY, INTEGRABILITY OR ACCURACY, AND CLIENT ACCEPTS THE ENTIRE RISK OF AND RESPONSIBILITY FOR SELECTION, USE, QUALITY, PERFORMANCE, SUITABILITY AND RESULTS OF USE THEREOF.
6. **LIMITATIONS ON LIABILITY.** IN NO EVENT WILL INNOVATIVE BE LIABLE FOR LOST PROFITS OR OTHER INCIDENTAL OR CONSEQUENTIAL, INDIRECT, SPECIAL, EXEMPLARY OR PUNITIVE DAMAGES UNDER ANY CIRCUMSTANCES WHATSOEVER, EVEN IF INNOVATIVE HAD BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES OR IF THEY WERE OTHERWISE FORESEEABLE. INNOVATIVE'S TOTAL LIABILITY FOR TORT, CONTRACT AND OTHER DAMAGES WILL NOT EXCEED THE TOTAL AMOUNT OF ALL FEES PAID TO INNOVATIVE BY CLIENT UNDER THE APPLICABLE SOW UPON WHICH A CLAIM IS FIRST ASSERTED AGAINST INNOVATIVE, LESS AGGREGATE DAMAGES PREVIOUSLY PAID BY INNOVATIVE UNDER THIS AGREEMENT. INNOVATIVE WILL NOT BE LIABLE FOR ANY CLAIM OR DEMAND AGAINST CLIENT BY ANY THIRD PARTY EXCEPT FOR THE INDEMNIFICATION SET FORTH IN SECTION 7. THESE LIMITATIONS OF LIABILITY WILL APPLY TO ALL CLAIMS AGAINST INNOVATIVE IN THE AGGREGATE (NOT PER INCIDENT) AND TOGETHER WITH THE DISCLAIMER OF WARRANTIES ABOVE WILL SURVIVE FAILURE OF ANY EXCLUSIVE REMEDIES PROVIDED IN THIS AGREEMENT.
7. **Indemnification.** Innovative will defend Client in any legal action filed by a third party against Client claiming the Services or Work Product as delivered to Client by Innovative pursuant to Section 1 infringes a U.S. copyright or U.S. patent; provided in each case that Client promptly notifies Innovative in writing of such claim and fully cooperates with Innovative in the defense of such claim. Innovative will also indemnify and hold Client harmless from any and all damages and costs (including reasonable attorney's fees) finally awarded by a court of competent jurisdiction in connection with any such claim, or agreed by Innovative in a settlement of such claim. Innovative will conduct the defense and any settlement negotiations in any such third-party action arising as described herein. This indemnification is limited to the Services and Work Product in the form delivered to Client and does not cover claims arising from (x) modifications thereto not made by Innovative, or, even if by Innovative, at the request of Client; (y) use of the Services and Work Product in combination with other software or items not provided by Innovative; or (z) third-party source code included in the Services and Work Product. If the use of the Services or Work Product by Client is enjoined, Innovative will, at its sole option: (i) obtain for Client the right to continue to use the Services or Work Product, (ii) modify the Services and Work Product to remove the cause of the claim, action or suit, (iii) replace the Services and Work Product at no additional charge to Client with an equally suitable, non-infringing service or work product, which will then be subject to the provisions of this Agreement, or (iv) terminate this Agreement and refund to Client that portion of the Fees allocable to the infringing component of the Services and Work Product, prorated for the period Client's use of the Services and Work Product is enjoined. None of the above warranties or remedies will apply with respect to any element of the Services and Work Product that has been modified by any party other than Innovative, or used in a manner for which the Services and Work Product are not designed or intended. This section states Innovative's entire liability and Client's exclusive remedies for infringement of intellectual property rights of any kind.

8. Confidentiality.

- a. Innovative acknowledges that any Client Resources or information, data, or documents disclosed by Client to Innovative in its performance hereunder are confidential and proprietary information of Client. Client acknowledges that all documentation, technical information, Software and other information pertaining to the Services, and/or Innovative's business interests or activities, methods of operation or customers that are disclosed by any party to Client in the course of performing this Agreement are the confidential and proprietary information of Innovative. The information and materials described in the two preceding sentences are referred to herein as "Confidential Information." Notwithstanding the foregoing, the term "Confidential Information" does not include information pertaining to a party if such information (i) is generally known to the public through no improper action or inaction by the other party, (ii) was, through no improper action or inaction by the other party, in the possession of the other party prior to the Effective Date, or (iii) was rightly disclosed to the other party by a third party if such disclosure does not violate the terms of any confidentiality agreement or other restriction by which such third party may be bound.
- b. All Confidential Information will be held in confidence and will not be copied, used or disclosed other than as set forth in this Agreement. Each party will take all reasonable efforts to protect the confidentiality of and prevent the unauthorized use of any such Confidential Information by any third party within such party's control. Each party may disclose Confidential Information (i) to the receiving party's employees and contractors required to have access to said Confidential Information for the purposes of performing this Agreement or using the Work Product, provided that such parties have entered into a non-disclosure agreement offering similar protection as is provided under this Agreement; or (ii) if such disclosure is in response to a valid order of any court or other governmental body, in which event, the disclosing party will use reasonable efforts to provide the other party with prior notice of such required disclosure.
- c. Recognizing that any improper use or disclosure of any Confidential Information by either party may cause the party whose Confidential Information is improperly used or disclosed irreparable damage for which other remedies may be inadequate, a party whose Confidential Information is improperly used or disclosed will have the right to petition for injunctive or other equitable relief from a court of competent jurisdiction as appropriate to prevent any unauthorized use or disclosure of such Confidential Information.

9. Term; Termination.

- a. This Agreement will be effective as of the Effective Date and will remain in effect until terminated as permitted under this section. Client may terminate this Agreement or an SOW at any time without cause upon 30 (thirty) days prior notice. Client may terminate this Agreement at any time if Client's budget (funding) is eliminated and Client provides written evidence to Innovative of the elimination of Client's budget (funding), such evidence to be in the form and substance reasonably requested by Innovative. Innovative may terminate this Agreement or an SOW for cause (i) if Client breaches any material term or condition of this Agreement or an SOW and such breach continues unremedied for 30 (thirty) days after delivery of written notice of such breach to Client, or (ii) if Client is declared bankrupt, admits its inability to satisfy its debts, or enters into any negotiation with its creditors for the settlement of its debts. Any notice of termination expressly purporting to terminate this Agreement in its entirety will also effectively terminate any and all SOWs then outstanding. Contrarily, any notice of termination purporting only to terminate one or more SOWs (but not purporting to terminate this Agreement or otherwise remaining silent as to the termination of this Agreement) will effectively terminate only such identified SOW(s), in which event this Agreement and all other outstanding SOWs will survive.
- b. Upon any termination of this Agreement, all paid Fees will be nonrefundable and Client will be responsible for all Fees and expenses for all Work Product provided or Services performed up to, and including, the date of termination. Otherwise, the rights and duties of the parties will terminate other than the obligation of the Client to pay Fees and expenses in accordance herewith, and the obligations of the parties pursuant to Section 3 (Ownership), Section 6 (Limitations on Liability), Section 7 (Indemnification), Section 8 (Confidentiality), and the governing law and venue provisions of this Agreement. Any termination of this Agreement will not waive or otherwise adversely affect any other rights or remedies the terminating party may have under the terms of this Agreement. Within 30 (thirty) days of a termination of this Agreement, each party must return or destroy all Confidential Information of the other party, as requested by the other party.

10. **Consulting Personnel.** Innovative agrees to keep accurate and complete records of tasks and hours of the Consulting Personnel in performing the Services. Innovative will be solely responsible for, at its own cost, verifying the employment history, educational and professional credentials and licenses, and criminal history of each of the Consulting Personnel. In providing the Services, Innovative will not knowingly utilize Consulting Personnel who have been convicted of fraud, theft, larceny, embezzlement or any other felony or other crime of moral turpitude. Innovative is solely responsible to ensure that all Consulting Personnel are in compliance with the Immigration Reform and Control Act of 1986 ("IRCA"). Specifically, Innovative will comply fully with the record keeping and other requirements of IRCA, including without limitation all I-9 requirements. Client is not responsible for sponsorship of any workers who perform Services for it at the request of Innovative. For Innovative employees working in the United States pursuant to this Agreement, Innovative will provide to Client only workers for whom Innovative has confirmed legal liability to perform services as employees in the United States, and for whom all required record keeping under IRCA has been performed and maintained. No Consulting Personnel will be entitled to participate in any compensation or benefits plan of Client. Innovative will be solely responsible for the payment of wages and any employee benefits to or on behalf of the Consulting Personnel for work performed under this Agreement and for withholding of any and all federal, state and local income taxes, paying social security taxes, unemployment insurance in an amount and under such terms as required by federal, state, or local law.

11. **Back-Up Activities.** Client has the sole responsibility for the maintenance and protection of all data provided by Client to Innovative for performance of the Services, including, without limitation, the making, storing and security of back-up and archive copies of such data (collectively "Back-Up Activities"), and Client acknowledges Innovative will not perform any Back-Up Activities for or on behalf of Client.

12. **General.**

- a. **No Waiver.** The failure of either party to enforce any rights granted hereunder or to take action against the other party in the event of any breach hereunder will not be deemed a waiver by that party as to subsequent enforcement of rights or subsequent actions in the event of future breaches.
- b. **Independent Contractor.** Client acknowledges that Innovative is at all times an independent contractor and that Client's relationship with Innovative is not one of principal and agent nor employer and employee. No Consulting Personnel will be entitled to participate in any compensation or benefits plan of Client.
- c. **Force Majeure.** Neither party will be liable or responsible for any delay or failure in performance if such delay or failure is caused in whole or in part by fire, flood, explosion, power outage, war, strike, embargo, government regulation, civil or military authority, hurricanes, severe wind, rain, other acts of God, acts or omissions of carriers, third party local exchange and long distance carriers, utilities, Internet service providers, transmitters, vandals, or hackers, or any other similar causes that may be beyond its control.
- d. **Notice.** Any notice or communication required to be given by either party must be in writing and made by hand delivery, express delivery service, overnight courier, electronic mail, or fax, to the party receiving such communication. Unless otherwise instructed in writing, such notice will be sent to the parties at the addresses set forth on the first page of the Service Agreement. Notice will be deemed given on the date of receipt or first refusal by the recipient. All communications pursuant to this Section will be deemed delivered as follows: (a) upon receipt, if delivered personally or by a recognized express delivery or courier service; or (b) when electronically confirmed, if delivered by facsimile.
- e. **Invalidity.** Any provision of this Agreement which is invalid, illegal, or unenforceable in any jurisdiction will, as to that jurisdiction, be ineffective to the extent of such invalidity, illegality or unenforceability, without affecting in any way the remaining provisions hereof in such jurisdiction or rendering that or any other provision of this Agreement invalid, illegal, or unenforceable in any other jurisdiction.
- f. **Counterparts.** This Agreement may be executed by the parties in separate counterparts by original, .pdf (or similar format for scanned copies of documents) or facsimile signature, each of which when so executed and delivered will be an original, but all such counterparts together constitute but one and the same instrument.
- g. **Publicity.** Except as provided in this Section, neither party will make any press release, public statement or other disclosure regarding the terms of this Agreement without the prior written consent of the other party, which consent will not be unreasonably withheld. Notwithstanding the foregoing, Innovative will have the right to issue

public statements pertaining to the existence of the business relationship between Innovative and Client, including the right to limited use of Client's name, logo and other reasonable non-confidential information in press releases, web pages, advertisements, and other marketing materials.

- h. Assignment. Neither party has the power to assign, license, or sub-license any of its rights or obligations hereunder without the prior written consent of the other party, which will not be unreasonably withheld. Any assignment, license, or sub-license attempted without such consent will be void. Notwithstanding the foregoing, a party may assign this Agreement without the other party's consent (i) as part of a corporate reorganization, consolidation, merger, or sale of substantially all of its assets or capital stock; or (ii) to an affiliate of such party provided that any such assignment will not release the assigning party from its obligations under this Agreement.
- i. Waiver of Jury Trial; Governing Language. EACH PARTY HEREBY WAIVES ITS RIGHT TO A JURY TRIAL IN CONNECTION WITH ANY DISPUTE OR LEGAL PROCEEDING ARISING OUT OF THIS AGREEMENT OR THE SUBJECT MATTER HEREOF. This Agreement and all proceedings hereunder will be conducted in the English language; any translation of this Agreement into another language will be for convenience only but will not modify the meaning hereof. Only a written instrument duly executed by both parties may modify this Agreement.
- j. Entire Agreement. This Agreement contains the entire understanding of the parties, and supersedes all prior agreements and understandings relating to the subject matter hereof, provided that nothing herein will diminish or affect any separate confidentiality agreement, license agreement or other document issued thereunder. The parties represent that they are sophisticated commercial entities, have had the opportunity to consult with their own counsel, and have included in this Agreement all terms material to the parties' rights and obligations with respect to the subject matter hereof and intend this document to be the final expression of their contractual intent. The parties further represent and acknowledge that communications exchanged between the parties during contract negotiation (including without limitation requests for proposals ("RFPs") and responses to such RFPs, questionnaires and responses to same) do not constitute a part of this Agreement. Purchase orders, work orders or other documents submitted by Client will be for Client's internal administrative purposes only and the terms and conditions contained in any such purchase order, work order or other document will have no force or effect and will not amend or modify this Agreement. In the event of any inconsistencies or conflicts among the GTCs, a Services Agreement or any other exhibits or schedules referenced by these GTCs, the following order of priority will control: 1. Service Agreement, 2. GTCs and 3. Any other terms, agreements, exhibits or schedules included in, or referenced by the Agreement.

Exhibit B
Statement of Work

[Statement of Work follows]

Statement of Work

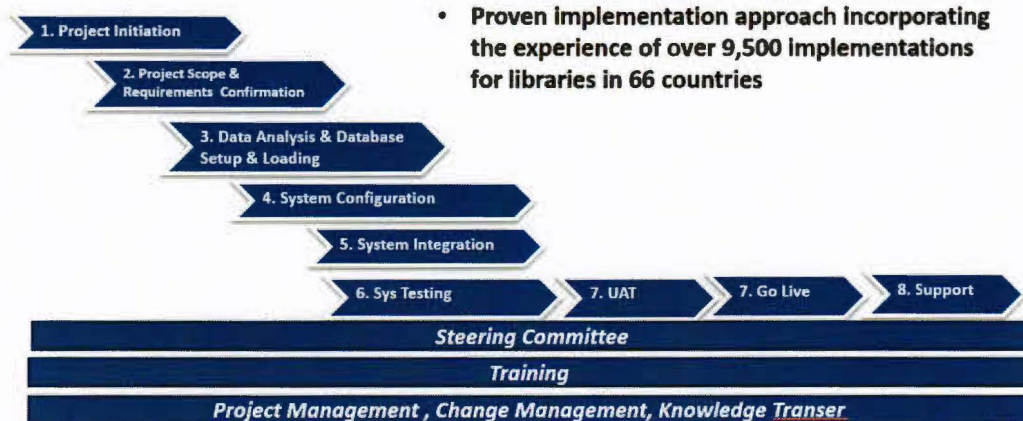
This Statement of Work (the "SOW") dated March 19, 2020 is entered into pursuant to the Master Professional Services Agreement between Nassau County Library ("Client") and Innovative Interfaces Incorporated ("Innovative") effective as of March 19, 2020 (the "Agreement"). Innovative and Client may each be referred to as "Party" from time to time or collectively as "Parties".

I. Purpose of this Statement of Work

The SOW provides an overview of the scope of the project and fees to complete the engagement based on Innovative's prior experience with similar projects and discussions with Client. The Client hereby acknowledges that the SOW is not meant to capture all detailed requirements but documents the high-level requirements and implementation approach outlined within the SOW. A final detailed requirements document will be provided to the Client for sign off on the final functional scope. Any changes to the assumptions or scope found within this SOW may affect the estimates and could result in a Change Request.

II. Implementation Methodology

Innovative will provide an industry proven implementation methodology that ensures the success of both the project management and technical aspects of the software implementation project.



III. Scope of Services

A. Polaris Success Bundle Implementation

1. Project Initiation and Kickoff

During this phase the parties set up management of the project, agree on project team members for both parties, and setup the project reporting and timeline management process. The Project Manager will execute the project plan for Innovative, and work in conjunction with the migration team at the Client. Key elements of the process include:

- Jointly developing a project schedule, at the beginning of the project, to track the execution and delivery of every key aspect of the migration project
- Jointly developing a list of project risks that need to be planned for and managed during the implementation project, as well as assigning the individuals responsible for managing each area

- Regularly scheduled conference calls between the project team at Innovative and the Client, to review the status of project tasks, discuss and resolve areas of concern, and discussion of risk areas
- Regular status reports to the Client
- Working sessions, early in the project, to develop the plans named above, to explain the implementation process, answer questions, and to develop the policy and data mappings that will be required to configure Polaris and load your data.
- To facilitate access to project information and resources, by Innovative and the Client, Innovative will establish an online project management site. The project management site will serve as the master archive for all project planning and management documents and databases, product documentation and inter-staff communication tools. The site will be established immediately upon assignment of the contract to the Innovative Project Manager, and access for Client project staff will be provided upon creation. The project management site will serve as the primary communication and sharing hub for the project management documents, tools, and methods.

2. Profiling

- Innovative will provide two (2) days of on-site Profiling:
 - Profiling Services are conducted as working sessions, between the Innovative Project Manager and the Client's ILS automation team. During the working sessions, the Innovative Project Manager will work with the Client's ILS automation team to document an extensive collection of system policy and profile information including, in part:
 - System, library and branch identities and locations, hours of operation, holidays, free days, patron and statistical categories, shelving locations, collections, material types, and numerous other operations parameters
 - Network and workstation data
 - Policy data such as circulation policies, fines and fees, notifications and notification policies, overdues, holds policies, holds routing, and numerous other pieces of policy information.

A comprehensive set of profiling guides and worksheets, will be provided to the Client in advance of system profiling. These guides will allow the Client to understand the profiling decisions that must be made by the automation team and allow for data collection to commence in advance of the profiling working sessions with the Project Manager. The provided guides, as well as the consultation provided by the Project Manager during the profiling working sessions, assist the Client in understanding the decisions being made, their impact on system operation once in production, and the implications of some profiling decisions on other decisions that must be made. Following profiling sessions, the Innovative project manager will use existing system migration tools to load the policy and profile information directly into the Polaris test/training database.

3. Software Setup and Access in Cloud Environment

Innovative will install the Polaris Success bundle in the Cloud environment and upon completion, the Client will confirm access to the software bundle outlined below and accept the software installation phase as complete.

- Polaris Success Bundle
 - Acquisitions
 - EDI - Electronic Ordering
 - EDI - Electronic Invoicing
 - Titles to Go
 - Selection Lists
 - Cataloging

- Polaris Authority Control
- Export Express
- Z39.50 Client, Broadcast & Server
- Circulation
 - Classic Inventory Control
 - Collection Agency / Debt Collection (Unique Management)
 - eCommerce - PowerPAC
 - Self-Check using Express Check
 - Floating Collections
 - Holds
 - Outreach
 - Interlibrary Loan
 - RFID Integration
 - NCIP for Third-party ILL
 - Notices
 - Offline Circulation
 - Patron Images
 - SIP2 Interface for Self Check
- eContent Integration
 - OverDrive
 - Cloud Library
- Unlimited PowerPAC Users
 - Children's PAC
 - Did you mean? (spellcheck)
 - Feature It
 - Location-based Profiles & PowerPAC Localization
 - Patron Self-Registration
 - Remote Patron Authentication against Polaris patron DB
 - RSS Feed Builder
 - URL Detective
- Serials
 - Claiming
- Polaris REST APIs
- Polaris Canned Reports
- Simply Reports
- SQL query access (read only) with Microsoft reporting services

4. Data Migration

Innovative will employ a “one database” concept for the Polaris implementation. The one database concept means that a single “shell” database is created at the beginning of the implementation, and as the implementation proceeds, successive layers of data and configuration are added to the database. The same database that the Client starts with at the beginning of the implementation is the same database that the Client eventually goes live on at the end of the implementation. The evolution of the database will proceed as follows:

- i. Shortly after the initial server installation is completed, Innovative will, put a “shell profiling database” in place. The evolutions of the database are described below. Each evolution of the database builds on the information gained from the testing of the previous evolution and replaces the previous evolution:
 - The first evolution of the database will occur during system profiling, when Client staff will work with the Innovative project manager to profile the system. Following system profiling working sessions, between the Client and Innovative, system policies, permission groups, users, workstations, and other

data will be entered directly into the shell database to configure it for the Client's implementation.

- The second evolution of the database will occur when the first (test) data load is completed. Following the test load, the database becomes the "training database". At this point in the implementation a fully functional, and fully populated, Polaris database exists. This database will be used for all profile and data migration testing and analysis, workflow analysis and consultation, and for all training. Access to the database is provided after the first data load is complete.
 - The third evolution of the database will occur in preparation for Go Live. The final data load is done on the profiled database and it is ready for production use.
- ii. Innovative will provide Data Migration Services to migrate the Client's data from their existing ILS into the Polaris ILS including analysis, mapping and loading of data into the Polaris Test/Training Database, as well as migration and loading of the production database immediately prior to go-live on Polaris.
 - iii. Data migration is performed in accordance with the specifications put forth in the Innovative Data Migration Guide. This guide specifies all data types that will be migrated from the legacy system. Included records are bibliographic, authority, item, patron, checkout, holds and fines records. If the Client desires that other data types be migrated, feasibility and cost of migration will be determined at the time of the request.
 - iv. During the course of the data load, the Client is responsible for working with Innovative on data verification to ensure that all of the data is migrated and reconciled over the course of the implementation. Pricing includes two full loads (test and production). Because of our data loading methodology, additional loads are usually not required. However, if the Client desires additional loads to be performed, they can be quoted for an additional cost.

5. Software Configuration

Innovative will adapt the system to Client's needs within the existing functionality in Polaris based on policy and other information gathered during Profiling sessions.

6. **Training Services** are delivered through onsite and web-based sessions. Training topics will be detailed in the schedule during the preparation phase based on Client go-live priorities and target dates.

The training sessions will include the following:

- Six (6) days of training onsite
 - Three (3) Days of Patron Services and Cataloging Training
 - Two (2) Days of Acquisitions Training
 - One (1) Day of Serials Training
- 24 hours of instructor led online webinar training on the following topics as applicable:
 - System Administration
 - Simply Reports
 - Outreach Services
 - Export Express
 - Feature IT
 - ILL
 - PAC

7. Go-Live

The Go-Live phase will begin one (1) to two (2) weeks before go-live (based on the jointly agreed upon schedule), when the final extraction of bibliographic records from the legacy database takes place. The key steps in the final go-live process are as follows:

- i. Library Staff must complete training on the Polaris Offline client in preparation for going offline after the final data extraction.
- ii. A copy of the Polaris test/training database will be copied to the Polaris Test database (if applicable) and the database on the production server will be scrubbed of the training data.
- iii. The final data extraction will be performed from the legacy ILS (bibs, items, patrons, circ and holds data, etc.). At this point, no more work can be done in the legacy ILS.
- iv. Staff begin off-line circulation in Polaris. In this mode, staff can check items in and out, and new patrons can be registered.
- v. Client staff will work with Innovative, and other vendors, to switch 3rd party products and services to point to the Polaris production database. Innovative will provide the necessary information such as IP addresses, port numbers and URLs that the Client needs to share with 3rd party vendors.
- vi. The production data load is completed.
- vii. Innovative and Client conduct QA of the database, and Client accepts the data load.
- viii. Offline circulation files are uploaded to the Polaris production database.
- ix. In-library PAC stations are switched to point to the Polaris PAC. Staff begin circulation in Polaris in on-line mode, and the Client goes live on Polaris.
- x. During the Go Live process, Innovative provides online consulting and assistance, as needed.

B. Third Party Data Extraction – Phoenix10 Technologies will perform the extract of data from the legacy system.

IV. Acceptance Testing

Client will have thirty (30) days to verify functions outlined in the scope of work. Material defects not in compliance must be submitted in writing. Innovative shall clarify and resolve blocker problems within thirty (30) days of receipt of report or provide the Client with a written estimate of when resolution will occur. Within seven (7) days of receipt of notice of resolution from Innovative, the Client shall retest the function and confirm that the function has or has not been resolved. If not resolved, Innovative will continue working to resolve the problem until resolution is accepted by the Client. Once resolved, the Client’s rights provided above will reset giving the Client another thirty (30) days.

V. Project Timeline

The following sample timeline begins after contract signing and outlines overall steps and responsibilities for a typical Polaris implementation. Event order and event time frames may be adjusted, e.g. time allotted for Client tasks may be extended or compressed. A project plan tailored to Client will be mutually agreed upon after project kickoff. The work plan, milestones, and deliverables will include a delivery/completion schedule that clearly identifies the deliverables, responsible parties, and the time of delivery.

MAJOR TASKS	DATES
Contract Signing	Week 1
Initial Phone Call with Customer to discuss project and profiles	Week 1
Library set-up in Supportal (Access, Documentation, Usage)	Week 2

Site Visit (Profile creation)	Week 3
Server staging	Week 4
Library System completes and submits Profiles to Project Manager	Week 6
Data Pull for Test load data analysis	Week 6
Implementation Profile input, review, and finalization	Week 7
Data Mapping	Week 8
Test data load	Week 9
Polaris QA of Data Load	Week 10
Library System has access to Test database for review and training	Week 11
Training – P1 – Circulation, Cataloging and PAC	Week 13
Acceptance Testing by Library System begins	Week 13
Library System internal staff training	Week 13
Third Party prep and testing	Week 13
Training – P2 – Acquisitions and Serials	Week 17
Training via Webinar	Week 18
Prepare for Polaris Offline	Week 20
Data Sign-off for Production load	Week 20
Library System is Offline with Polaris	Week 21
Final data migration on Production server	Week 21
Final Data QA	Week 21
Library System review of Production database and upload offline files	Week 21
Library System is Live on Polaris	Week 21
Completion of System Acceptance Testing	Week 25
Transition to Polaris Support	Week 26

VI. Fees and Payment Terms

Fees for Services delivered under this SOW will be charged on a fixed price basis as set forth in the Innovative Pricing Exhibit EST-INC9533 attached herewith and are made in good faith based on the activities, approach, and assumptions contained within the SOW. Payment terms for this SOW are as set forth in the Professional Services Agreement. Any additional Change Requests will be performed at a blended rate of \$200 per hour for all resources. Additionally, Client is responsible for all reasonable out-of-pocket costs and expenses incurred during this SOW. Pricing assumes that deliverables in this Statement of Work are completed within six months or additional Services fees will apply.

	Service Milestones	Percentage	Billing Amount
Milestone 1	Kickoff, Profiling Visit	10%	\$4080
Milestone 2	Software Installed, Profiling D/B Created	10%	\$4080
Milestone 3	Data Mapping for Test Load, Software Configuration	20%	\$8160
Milestone 4	Test Load	20%	\$8160
Milestone 5	Training	20%	\$8160
Milestone 6	Production Load	10%	\$4080
Milestone 7	Go Live, Acceptance Testing	10%	\$4080

VII. Innovative Services Team

The process of ensuring a seamless migration to a new integrated library system begins immediately after contract signing. After the contract is signed, Innovative will assign a project team to your implementation. The project team will consist of:

- A. Project Manager:** The Project Manager is assigned to provide project management, resource management, risk mitigation and issue management. The Project Manager is the single point of contact throughout the implementation to coordinate work plans, schedules,

and teams' work. Will manage day-to-day operational aspects and ensure deliverables are met within a timely manner and according to the mutually agreed project plan.

- B. Data Analyst:** The data migration specialist is responsible for creating, maintaining, and executing the SQL scripts, and other software, required for migrating your existing ILS databases into the Polaris ILS database.
- C. Polaris Trainer/Consultant:** One or more Polaris trainers/consultants will be assigned to your implementation, shortly after the project kicks off. Your trainers are selected based on their knowledge of the specific subsystems and options that you will be implementing, as well as their experience in training similar libraries. All Polaris trainers have significant experience in ILS operations and training.
- D. Polaris System Engineer:** The Polaris System Engineer performs the staging and installation for your Cloud system.

By assigning this multi-disciplinary team to your implementation we can maximize the familiarity of the project team with your library and your implementation.

VIII. Client Implementation Team

In order to ensure a successful implementation, Innovative requests that the Client designate individuals from your staff to assume responsibility for the following roles

- A. Project Manager:** Works directly with the Innovative Project Manager to ensure that risks are mitigated, appropriate communication is achieved, and milestones are met. Works with Innovative Project Manager to coordinate work plans, schedules, and teams' work. Will manage day-to-day operational aspects and ensure deliverables are met. Responsible for Project Steering Committee status reporting and Executive communications.
- B. Librarian Lead:** Works closely with Project Managers to ensure requirements are comprehensive and representative of the needs of the Client. The Librarian Lead will coordinate with key members of the team as required.
- C. Technical Lead:** Will be responsible for assisting with Client responsibilities related to data migrations and any other system level duties required by Client.

IX. Implementation Assumptions

As part of the Innovative proposal for the implementation, we have outlined the following project assumptions which are critical to the successful delivery of the project:

- A.** Client will have adequate resources available to ensure timely completion of any Client tasks outlined in the project schedule.
- B.** Timeline for the completion of this project will be established, through joint planning conversations between the Client and Innovative during the initial stage of the project.
- C.** Client will provide a technical point of contact who is able to provide, or coordinate access to, necessary information and library resources. This includes information related to server access, collecting and providing any prerequisite information required to support installation and configuration of software, and other needs that may arise during the project.

IN WITNESS WHEREOF each party has caused this SOW to be executed by its duly authorized representatives.

AGREED:

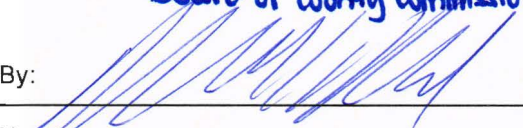
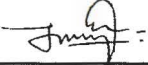

Client	Innovative
Nassau County Library Board of County Commissioners By: 	Innovative Interfaces Incorporated By: 
Name: Michael S. Mullin	Name: Akin Adekeye
Title: County Manager	Title: EVP, Legal & Business Development
Date: 	Date: March 19, 2020

Exhibit C
Pricing Exhibit

Additional Terms:

1. **Fees.** All Fees, expenses and other amounts owed to Innovative must be paid to Innovative within forty-five (45) days following receipt of the invoice.
[Approved Quote follows]



Pricing Exhibit

Innovative Interfaces Incorporated
 1900 Powell St.
 Suite 400
 Emeryville CA 94608
 United States

Date 3/19/2020
Quote # EST-INC9533
Payment Terms Net 45
Sales Rep Carrie Pearson
Technical Contact CU6726 Nassau County Library : D...
Site Code
Expires 3/31/2020

Bill To
 Nassau County Library
 25 N 4th St
 Fernandina FL 32034-4123
 United States

Ship To
 Nassau County Library
 25 N 4th St
 Fernandina FL 32034-4123
 United States

Currency
 US Dollar

Item	Item Category	Qty	Description	Options	Original Rate	Discounted Rate	Amount
Polaris Public Success Bundle Implementation Services	Services	1	Polaris Public Success Bundle Implementation Services			41,000.00	32,800.00
Polaris 3rd Party Data Extraction	Services	1	Polaris 3rd Party Data Extraction			8,000.00	8,000.00

Total Fees US\$40,800.00

Justification Letter



Dawn S. Bostwick, Library Director
Janet W. Loveless, Assistant Director

Nassau County Public Library System

25 N. 4th Street
Fernandina Beach, FL 32034
Phone: 904-530-6500 Fax: 277-7366

<http://read.nassau.lib.fl.us>

To: Megan Diehl, OMB Director

From: Dawn S. Bostwick, Library Director

Date: 1 March 2020

Re: Purchase of Library ILS System

UMD
4/15/20

Hello Megan,

I prepared the Request for Quote for a new ILS software for the Library System. I received two quotes; one from Innovative Interfaces Incorporated (iii) and the other from The Library Corporation (TLC). The third company, Autographics, chose not to respond with a quote as they did not have five public libraries in the state of Florida using their system, as I requested in the RFQ.

I have evaluated each of the systems, through visits at vendor booths at conferences, through webinar demonstrations, and from on site visits. I am recommending the purchase of Polaris software, a product of Innovative. They develop strictly for the public library market, they are forward thinking, they will migrate all of our data into their software at no extra cost, and we have examples of larger library systems within our state using this software. There is demonstrated room for growth for the Nassau County Public Library System.

Innovative is also the least expensive, their quote is \$40,800.00. TLC has quoted \$45,611 for installation.

I would like to proceed with the purchase of the Polaris software from Innovative. This is a budgeted item.

Callahan

450077 State Rd 200
Callahan, FL 32011

Hilliard

◆ 15821 CR 108
Hilliard, FL 32046

Yulee

◆ 76346 Wm Burgess Blvd
Yulee, FL 32097

Bryceville

◆ 7280 Motes Rd
Bryceville, FL 32009

Quote # 1

**Nassau County Board of County Commissioners
Request for Quotation Form**

Requesting Department: Nassau County Public Library **Date:** 12/16/2019
Department Address: 25 North 4th Street
Fernandina Beach, FL 32034
Contact: Claire Shepherd
Contact email: cshepherd@nassaucountyfl.com
Department Phone: 904-530-6503
Department Fax: 904-277-7366

Product(s)/Service(s) to be purchased (list all specifications and requirements):

Fully Integrated Library System Software
Please see Attachment A for detailed specifications and Requirements

*** All charges must be on your quotes in order to be considered
and This RFQ must be filled out, signed and returned to be considered.
Nassau County Does not Fill out Credit Applications.
Payment is per Florida Statutes 218.73 & 218.74**

Please submit written response by: January 3, 2020
(Date)

To be completed by vendor:

Vendor Name Innovative Interfaces Incorporated
Address: 1900 Powell Street, Suite 400
Emeryville, CA 94608
Phone: 281-251-9289
Fax: _____
Contact: Carrie Pearson
Email: carrie.pearson@iii.com

Attached is a written quote from our company, which is valid for 90 **days.**

January 3, 2020



Signature **Date**

Comments: _____



1900 Powell Street, Suite 400
Emeryville, CA 94608
510.655.6200
www.iii.com

Nassau County Public Library
RFQ for Fully Integrated Library System Software
January 3, 2020



January 3, 2020

Claire Shepherd
Nassau County Public Library
24 North 4th Street
Fernandina Beach, FL 32034

Dear Claire,

Innovative Interfaces is pleased to respond to your Request for Quotation for Integrated Library System. We have carefully reviewed your document and are proposing Innovative Interface's Polaris ILS as for your future system. Polaris has been designed for, and is primarily focused on, the needs of public libraries. Polaris is designed from the ground up to provide a robust and scalable solution with powerful staff tools and an intuitive experience for patrons. Your hallmark as a public library revolves around serving your customers – and you can expect the same commitment to your customers from Innovative Interfaces. Service has always been a cornerstone at Innovative. We understand why and how service is important to you; we feel the same way.

The Polaris ILS includes a number of significant capabilities beyond what you have now:

- **A mobile patron services tool** – full mobile circulation features coupled with the ability to provide excellent patron service *wherever* your patrons are.
- **Full access to your data** – Your staff can create reports/queries on any data in your database, using full SQL queries or SimplyReports, our web-based, point-and-click report writer.
- **Powerful APIs** – open your Polaris system to a myriad of third-party integrations or create your own tools and interfaces.
- **Comprehensive discovery** – Patrons can find more of what the library has to offer within the native Polaris PowerPAC. The PowerPAC includes the ability to feature material, databases, events, clubs and organizations. This information is featured within the same search that patrons use to find both print and electronic material.

Innovative has years of experience migrating libraries from Symphony to Polaris. We're proud of our reputation for implementing systems efficiently and on-schedule and a key component to our approach is collaboration. Your new ILS implementation is the first step in what we hope is a long and valuable partnership.

It was recently announced that ExLibris, a ProQuest Company, has signed an agreement to acquire Innovative. It is anticipated this will be finalized in January. This will not affect our proposal or any subsequent contract. ExLibris is an academic focused company, and with the purchase of Innovative, and the Polaris product, they will be able to expand their users to include public libraries. Your implementation and support will still be handled by Innovative staff who specialize in Polaris.

As you look at a new ILS partner, this will be a long-term relationship – and you need to know that your partner has a solid product for today as well as a vision for the future. With Innovative you will receive that. As we look to the future, we will provide solutions which will re-imagine the library and help you provide the same experience that your patrons have with tools and technology that they use every day.

We look forward to working with you through this process. If you have any questions, please do not hesitate to reach your Account Manager, Carrie Pearson at 281-251-9289 or carrie.pearson@iii.com.

Best regards,



Carrie Pearson, Regional Sales Executive

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Polaris Solution Overview

As a library software and services company for over 40 years, Innovative has a unique perspective on the project Nassau County Public Library (NCPL) is about to undertake. Our approach is simple – treat our customers as partners and work with them to deliver the unique solution and implementation they are looking for.

Polaris is designed from the ground up to provide a robust and scalable software solution for public libraries, delivering an extensive feature set covering the full spectrum of public library activities. Polaris provides a robust and scalable solution with powerful staff tools and an intuitive experience for patrons. Built on a Microsoft SQL server database platform with documented APIs, the Polaris ILS is open to connections: with your patrons and their social media, with third-party vendors, and with resources beyond your walls.

Leap Web Interface

In a time where mobile applications increasingly allow people to access information and consume services wherever they may be, libraries need the tools to interact with their communities beyond the traditional library building. The Polaris Leap web interface allows staff to get out from behind the desk and still have access to vital data and functionality with flexible, intuitive workflows. Polaris Leap is responsive on all mobile devices and builds upon the Polaris ILS foundation, extending functionality with a modern architecture that will serve libraries now and into the foreseeable future.

Polaris PowerPAC Discovery

The responsive Polaris PowerPAC provides patrons with a rich, yet accessible, online library experience. This web-based PAC offers a powerful, flexible search engine, easy access to the patron's own record, and access to any other information the library wants to provide, in a readily customized interface. Polaris PowerPAC offers a full suite of discovery service features including faceted browsing, related searches, enriched catalog data, "did you mean?" hints, and social features such as reader ratings, tagging, and reviews.

Response Time

Innovative has performed extensive load and performance testing on its Polaris product for the Phoenix Public Library, achieving < 2 second response times and the equivalent of over 47M annual circulation transactions without any degradation in system performance. We have every confidence in our ability to deliver the same superior results for NCPL.

Cloud Hosting

Innovative's cloud-hosted, subscription solution is provided on Amazon Web Services (AWS) with data centers located in multiple locations, allowing Innovative the ability to implement each customer's cloud hosted system at the data center within the customer's region in compliance with the region's data privacy laws. All management services are provided directly by Innovative Cloud Services staff. Features of *Innovative Cloud Hosting Services* and infrastructure can be found later in this proposal.

Software Must Include but Not Limited to:

Circulation Module

Must integrate and be fully functional with third-party software products: Comprise Smart Manager and Comprise Smart Pay.

 innovative

Comprise Smart Manager

Innovative has implemented several Polaris extensions to SIP2 to facilitate a rich user experience. We have implemented individual vendor profiles to help service the specific needs of Comprise (among others).

Comprise Smart Pay

Polaris offers integrated e-commerce solutions through relationships with two third party partners (Comprise Technologies and EnvisionWare) so that the payment of fines, fees, and donations can be done through the PAC and self-service stations, and the patron account is updated accordingly. In addition, payments and issuing of refunds can be performed in the Polaris staff client, with reports generated accordingly. These third-party partners have specialized in servicing the library market and are well-regarded for their support and innovation. We can provide pricing for either vendor as needed.

Must have 100% same functionality behind the desk at a PC as on a mobile device.

 innovative

More than simply mobile circulation, Polaris Leap features a comprehensive suite of staff services coupled with the ability to provide excellent patron service wherever your patrons are.

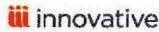
Features

- Mobile access for public services and reference staff
- Responsive web client using HTML5
- Circulation and patron services functions
- Flexible workflows in an intuitive interface
- No need to update client software

Functions

- Patron registration and account editing
- Check-out, check-in, and renewals
- Fines payment
- Picklists
- Claims

Must be able to email patron notices and news.

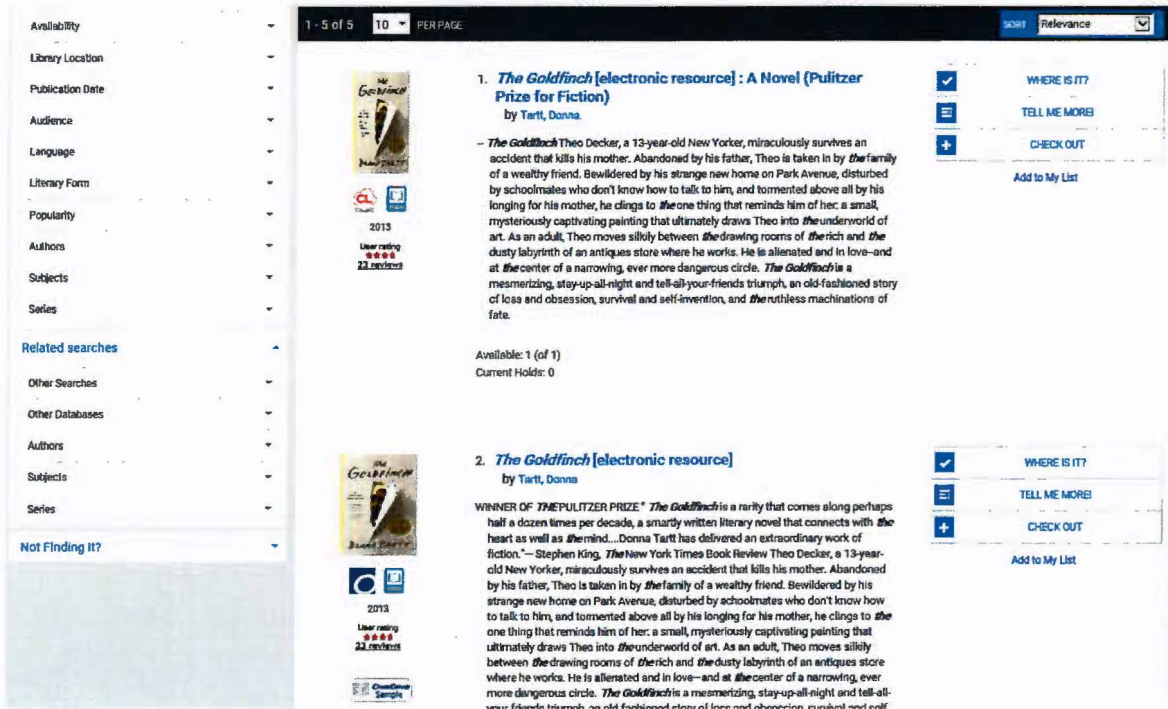
 innovative

Notification options are set in Polaris Administration. These settings specify the types of notices the library sends, the library that generate the notices, the delivery methods (print, e-mail, text message, telephone, or patron preference), the notice intervals, the notice language, and other options. The library can customize notices so that they include specific data elements and can use the Polaris Language Editor to customize the notice text.

Must integrate with Bibliotheca cloudLibrary, and import these ematerials into the public catalog.

 innovative

Polaris supports eBook integration. When the eBook vendor integration is implemented in Polaris, patrons can search for, place holds on, and check out eBooks from the vendor either directly from the PAC or the vendor's application. All associated circulation and patron accounting processing occurs in Polaris and is synchronized with any transactions made in the vendor's application. The library may restrict the display of integrated eBooks in search results and their subsequent circulation to specific organizations in the library system according to vendor contract.




Polaris is currently fully integrated with Bibliotheca cloudLibrary, OverDrive, Baker & Taylor Axis 360, and Recorded Books (RBDigital).

Personal information:		
First name: [*] <input type="text"/>	Middle name: <input type="text"/>	Last name: [*] <input type="text"/>
Gender: <input type="radio"/> N/A <input type="radio"/> Female <input type="radio"/> Male	Birth date: [*] MM <input type="text"/> DD <input type="text"/> YYYY <input type="text"/>	
Address information		
Street 1: [*] <input type="text"/>	Street 2: <input type="text"/>	
City/Town: BAYBERRY	State/Province: NY	
Postal Code: 13090 - <input type="text"/>	Registered at: Red Rock Public Library	
Contact information		
Email address: <input type="text"/>	Alt. E-mail Address: <input type="text"/>	
Phone 1 <input type="text"/> - <input type="text"/> - <input type="text"/>	Phone 2 <input type="text"/> - <input type="text"/> - <input type="text"/>	
Phone 3 <input type="text"/> - <input type="text"/> - <input type="text"/>		
Preferences:		
My preference for receiving library notices: Mailing Address <input type="text"/>	Language preference: English <input type="text"/> <i>Notices are sent in English or Spanish</i>	
Phone number for TXT messages (None) <input type="text"/>	Carrier <Select a carrier> <input type="text"/>	
E-receipts: (None) <input type="text"/>		
Additional information:		
Drivers License : <input type="text"/>	Newsletter : <input type="text"/>	
Book Club : <input type="text"/>	Internet Enabled : <input type="text"/>	
Voting District : <input type="text"/>		
Logon information:		
Username: <input type="text"/>		
Password: [*] <input type="text"/>		
Verification: [*] <input type="text"/>		
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>		

Search my community for:


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1 - 10 of 183 per page Sort Page **(1)** 2 ... 19 ▶

- 


1. [Kiwanis Club of East Fort Bend County](#)

... A service organization that respond to the unique needs of their ...

Telephone: 281 491 0013
E-mail: weschultz@stpegs.com
Web Link
- 

2. [American Red Cross - Southwestern Branch](#)

... Volunteer workers in social service ...

Primary Address: 2610 B.F. Terry Blvd Rosenberg, TX 77406
Telephone: 281-342-9480
E-mail: jrevino@ghac.org
Check out the home page of the local chapter. We need your Support
- 

3. [Real Heroes Breakfast](#)

hosted by American Red Cross - Southwestern Branch

... Volunteer workers in social service ...

Primary Address: 2610 B.F. Terry Blvd Rosenberg, TX 77406
Telephone: 281-342-9480
E-mail: jrevino@ghac.org
Nominate a hero

Must be able to offer choice of print receipts, email receipts or no receipt for patrons.

innovative

Polaris provides the following customizable receipt types:

- **Check In Receipt**

The Check In Receipt can be manually printed from the Check In workform. When a patron's items have been checked in, staff can select one or more items in the list and print a receipt. Check In Receipts include the item barcode, title, author, material type, call number, and patron's limited barcode. The following informational fields are also available for use: author, due date, item's assigned branch, full patron barcode, patron name, status. These options can be set at the system, library, or branch level.
- **Check Out Receipt**

The Check Out Receipt lists the items checked out or renewed for a patron. Check Out Receipts can be printed from the Check Out workform; renewal receipts can be printed from the Check Out workform and from the Patron Status workform. Check Out Receipts always display the library name, date/time, type of receipt, item titles, and due dates. The following information can be added: call number (item), item barcode, item count (total number of items), library phone number, material type, patron barcode (limited – last 5 digits of the patron barcode), patron name, staff record number (unique identification number from the staff member record), web address (library URL defined in the organization record), any user-defined fields from the patron record.
- **Items Out Receipt**

The Items Out Receipt lists all the items a patron currently has checked out. The header always includes the library name and date/time. The library can include the following header data: author, call number, collection, due date, any custom note set for printed receipts, items' assigned branch, item barcode, item count, library phone, material type, limited patron barcode, patron name, renewals left, title, library web address, and user-defined fields.
- **Fine (Payment) Receipt**

Payment Receipts record the fines paid or waived for overdue items, replacement items, and other fees for a patron. They always include the library name, date/time, type of receipt, title, item barcode, reason (from the charge transaction), the amount paid or waived, and total charges.
- **eReceipts**

eReceipts (email and/or text message receipts) can be sent to patrons who prefer either of these options. eReceipts are available for check out, renewal, and payment receipts from the staff client; and renewals from PAC. No overnight processing is required, so these receipts are sent within a few moments of the transaction.

Must have splash page for web catalog.

innovative

Polaris PowerPAC offers a wide range of customization options so that the NCPL can create the user experience you desire. The library has the option, through System Administration, to define their own logo image as well as background and foreground colors for the header and custom HTML for the main portal page. Polaris includes the ability to have a custom theme down to the individual library and/or branch level.

Custom themes, which give the user much more control over the look and feel of the interface (including colors, font sizes, replacement of any image), are maintained in a custom directory. Some basic knowledge of HTML/CSS/XML/XSLT is needed to make these customizations. This allows for a library to brand their PowerPAC site to mirror the look and feel of their library web site.

Visit http://polaris.iidiscovery.com/?page_id=780 to see how a variety of Polaris customers have taken advantage of the ability to customize the Polaris PowerPAC.

Additionally, here are the direct links to a few notable examples:

- Baltimore County Public Library: <http://www.bcpl.info>
- Denver Public Library: <http://catalog.denverlibrary.org>
- Pierce County Library System: <http://polariscatalog.piercecountylibrary.org/polaris>
- Salt Lake City Public Library: <http://www.slcppl.org/>

EDI

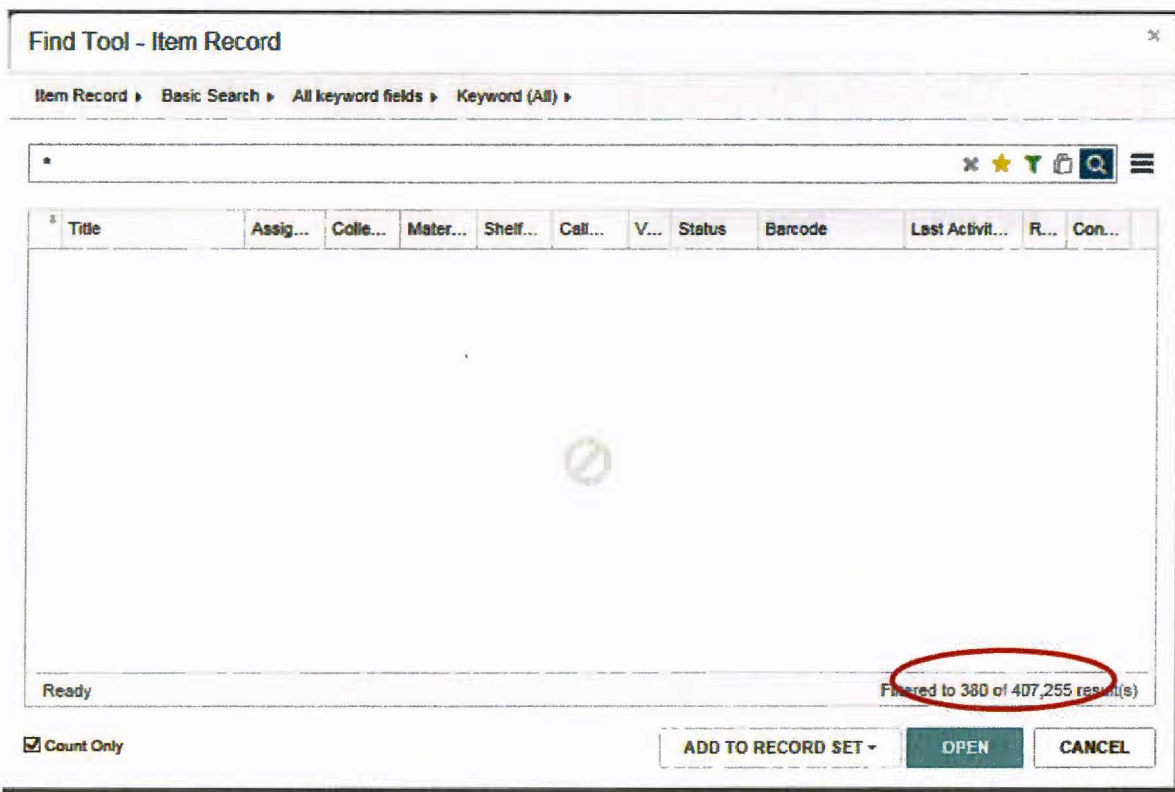
Innovative staff will do all the setup required for EDI as part of the implementation process. Once you have implemented EDI with a supplier, your library can send electronic purchase orders and receive acknowledgments and invoices electronically (and advanced shipping notices, if the supplier produces them) using electronic data interchange (EDI) and Polaris Acquisitions. After the supplier receives the EDI order, an electronic order acknowledgment is put into the library's account folder on the supplier's FTP server. If the supplier can produce Advanced Shipping Notice (ASN) files, an ASN is also put into this folder when the order is prepared for shipment. Then, when the order is filled, the electronic invoice is put into this folder. An SQL job retrieves the files from the supplier's FTP server and loads them into a directory in Polaris, creating an invoice with the suffix EDI. The purchase order acknowledgment file (POA) is used to create the Electronic Purchase Order Acknowledgment report, the ASN file is used to receive shipments in bulk, and the invoice file is used to create the EDI invoice record in Polaris.

Polaris supports the X12 version 4010 standard to transmit purchase orders electronically, load electronic confirmations (or receive confirmations via email) and generate invoices in Polaris using the following vendors:

- Audio Book Services
- Baker & Taylor
- Brodart
- Children's Plus, Inc.
- Findaway World
- Gale-Cengage Learning
- Ingram
- Library Bound
- Micro Marketing LLC
- Midwest Library Service
- Midwest Tape, Inc.
- CVS Midwest Tape
- Penworthy
- Quality Books, Inc.
- Rainbow Books
- Recorded Books
- Scholastic Library Publishing
- United Library Services
- Whitehots, Inc.

The Find Tool provides access to a vast amount of data in the Polaris database. The user interface provides for access to all commonly used data without the need for building custom indices, as would be required in some competitor's systems. The Find Tool accesses the live Polaris database, so all data access is in real-time. The cost for this function is included in the cost of the Polaris staff client license.

In the Polaris staff client, the Polaris Find Tool can be used to search for records with a variety of methods and filters. The Find Tool can also be used for quick snapshots of the library's data. For example, if the library simply needs a count of items last circulated in 2017, the user can run this search and set the Find Tool to show only the record count in the search results.



SimplyReports

Polaris SimplyReports opens up the power of the Polaris database management system to all users, regardless of technical skill. Users without knowledge of SQL or Microsoft SQL Reporting Services can create custom reports with a simple Web-based interface. The web-based application can be accessed through any modern web browser.

SimplyReports closely resembles the reporting applications provided by "second generation" ILS products. As such, it provides a fixed number of tables and columns that can be accessed, along with appropriate scoping and filtering criteria that can be applied against those data elements. It allows

Innovative Cloud Hosting Services

Innovative's cloud-hosted, subscription solution is provided on Amazon Web Services (AWS) with data centers located in multiple locations, allowing Innovative the ability to implement each customer's cloud hosted system at the data center within the customer's region in compliance with the region's data privacy laws. All management services are provided directly by Innovative Cloud Services staff. Features of Innovative Cloud Hosting services and infrastructure include:

- **Servers:** Innovative leverages Amazon's EC2 (elastic compute) designed for 99.95% availability and provides for scalable computing capacity to provide exceptional performance. The EC2 instances are deployed on AWS' virtualization stack designed with high availability clusters and with committed resource allocations. The EC2 instances are deployed into clusters configured using XEN hypervisor technologies.
- **Scalability:** New server instances boot up in minutes, controlled with web services APIs. Allows for scaling capacity, both up and down, as computing requirements change.
- **Physical Security:** AWS' data centers are designed to satisfy requirements of most security sensitive customers with constant monitoring, high automation, high availability, and highly accredited to global security standards, including: PCI DSS Level 1, ISO 27001, FISMA Moderate, FedRAMP, HIPAA, and SOC 1 (formerly referred to as SAS 70 and/or SSAE 16) and SOC 2 audit reports. Innovative also holds ISO27001 certification for Cloud Hosting services.
- **Fire Detection and Suppression:** Automatic fire detection and suppression equipment has been installed to reduce risk. The fire detection system utilizes smoke detection sensors in all data center environments, mechanical and electrical infrastructure spaces, chiller rooms and generator equipment rooms. These areas are protected by either wet-pipe, double-interlocked pre-action, or gaseous sprinkler systems.
- **Power:** The data center electrical power systems are designed to be fully redundant and maintainable without impact to operations, 24 hours a day, and seven days a week. Uninterruptible Power Supply (UPS) units provide back-up power in the event of an electrical failure for critical and essential loads in the facility. Data centers use generators to provide back-up power for the entire facility.
- **Environmental Controls:** Climate control is required to maintain a constant operating temperature for servers and other hardware, which prevents overheating and reduces the possibility of service outages. Data centers are conditioned to maintain atmospheric conditions at optimal levels. Personnel and systems monitor and control temperature and humidity at appropriate levels.
- **Operating System Maintenance:** Innovative has implemented a patch management policy which includes testing of patching before they are deployed to production customer instances. All customer instances are patched with security patches on a monthly basis. Any update requiring system outage is scheduled during the regular maintenance window with advance notification to ensure that library operations are not disrupted.

- **Performance Monitoring:** Innovative’s automated monitoring service ensures that hosted services are operational and meeting performance commitments. We have the following monitoring in place on all managed servers:
 - **Ping monitoring:** To ensure that the server(s) are up. When a server cannot be pinged, alerts are sent to the Innovative Customer Services team for investigation.
 - **AppDynamics:** This helps Innovative to collect, analyze, and monitor application and infrastructure performance data. IT and customer support staff are able to proactively and quickly identify, isolate and mitigate application and system level issues.
- **Standard Service Backup:** Innovative performs daily backups using AWS' snapshot based technology as part of the standard hosting package. The snapshots are stored in geographically diverse AWS S3 locations that are replicated to other availability zones to meet the offsite storage requirements for all customers. Random backups are periodically tested and restored to ensure compliance.
- **Recovery Services:** Innovative Disaster Recovery (DR) plan was developed from the NIST SP800-34 framework. Standard hosting terms include disaster recovery on a best effort basis. In the unlikely event of a disaster at the primary location, the latest backup is restored to a different availability zone on a best effort basis.

Innovative also offers enhanced disaster recovery services to meet specific Recovery Point Objective (RPO) and Recovery Time Objective (RTO). The enhanced DR service also comes with a customer specific DR plan and annual testing of that plan. The Disaster Recovery is provided by replicating the bits to AWS instances in a different region within the continent. If there is no separate region available in the continent or if the customer requires the data to be in country, then the replication is done to a different availability zone in the same region.

Service Level	Measure or Feature	Value
Tier 1	Recovery Point Objective (RPO)	4 hours
	Recovery Time Objective (RTO)	8 hours
	Customer specific DR plan and DR test	Included
	DR location	Alternate Availability Zone/Region
Tier 2	Recovery Point Objective (RPO)	24 hours
	Recovery Time Objective (RTO)	24 hours
	Customer specific DR plan and DR test	Included
	DR location	Alternate Availability Zone/Region

Phase 1 – Project Planning

The initial phase of the project establishes clear project sponsorship, ensuring that the management resources are in place to guarantee project success. Library needs and expectations are fully discussed, and agreement achieved on deliverables. The project plan phases are expanded with detail provided as to timeline, responsibilities, and ownership. A communication plan is created that determines the frequency and method of communications between the Innovative and library project teams. Team assignments are finalized as well as roles within the teams to ensure clear responsibilities and accountability.

The outcome of Phase 1 is creation of a Tracker project, full access to the Polaris Implementations Portal, downloadable Polaris documentation, project team identification and organization, establishment of an implementation project schedule, and agreement on the final project plan and timeline.

Phase 2 – Profiling and System Setup

The second phase of the implementation focuses on getting your software configured and your data successfully migrated. During this phase, your project team will assist with creating a profile for the system settings. Your servers will also be staged and prepared with the Polaris software in anticipation of the training data load.

The outcome of Phase 2 is full access by your library to the software, completion of the profile review, and approval/signoff of the initial profiling.

Phase 3 – Data Mapping and Test Load

The third phase of the implementation focuses on data. During this phase, your project team will assist with data mapping. Your library will have opportunities to participate in the data process, from mapping existing data to new Polaris settings, reviewing migrated data in Polaris, and final approval of the data migrated. There will be ample opportunity to review the initial data migration and for Innovative to correct any problems discovered.

The outcome of Phase 3 is a completed data load on the test database for training.

Phase 4 – Training and Data/Configuration Review

The fourth phase continues to build on the setup and profiling of your system with training on the software and data review. The “train the trainer” sessions focus on making sure that your core staff has the knowledge and the tools that they need to effectively extend that training to frontline staff. Because Polaris training is performed using your own data, there will be ample opportunity to review the initial profiling and data mapping, and for Innovative to correct any problems discovered. Innovative trainers support the library training staff to make sure they are successful in preparation for production rollout. This is also the time to complete Integration testing for third party products.

Phase 4 gives you the confidence that your system is working as promised. You’ll have the opportunity to verify the data load, test the system functionality, train your staff, and have the opportunity to make any configuration adjustments as desired.

Polaris Data Migration Services

Our knowledge of library system data and policy codes allows us to provide the library with a comprehensive and accurate migration to the Polaris system. During the migration, Innovative's Implementation Services group will work closely with the library's assigned project team to create a profile for the data migration project that accurately reflects the library's desired data mapping instructions. Issues such as local holdings mapping and conversion of existing item and patron codes to corresponding Polaris values will be discussed to ensure the accuracy of the process.

Data Review

Once the implementation project begins, the library will provide Innovative with a copy of the database files to be converted. These files must be provided to Innovative in accordance with the content and format specified in the "Polaris Data Migration Guide". This document will be provided at the beginning of your implementation but may also be requested at any time. Innovative will test and analyze copies of library-provided data to determine if it can be migrated as-is to the Polaris system. Reports will be generated during this discovery phase to determine if action must be taken to correct structural problems with the data (such as removal of corrupt records or identification of item or patron records that contain erroneous or missing coding). Library staff will also find these reports useful during the profiling of Polaris policy and statistical codes, and to make individual corrections to incorrectly coded data.

If our review reveals significant issues with the data or if the library already has a list of cleanup procedures it wishes to address, the library's assigned project lead and Innovative's assigned migration specialist can discuss the available options. If the library has contracted with Innovative for custom data conversion or Library of Congress authority control processing services, a profile and planning for these processes will be established during the discovery phase.

Depending on the library's capability to customize the output mappings for item and patron records, we can provide a layout of preferred record structures to assist in streamlining mappings from the legacy file structures to those used by the Polaris system; otherwise, we will re-map the fields to the locations we use for loading. Innovative will develop a code mapping profile with the library's assistance to change the current system codes to those preferred in the Polaris system. Additionally, the layout of some fields, such as call numbers or notes in the items and demographic data (names, addresses, phone numbers, etc.) or notes in the patron records, will most likely need to be altered to reflect their corresponding structures within the Polaris system. Assuming the exported data is uniform, these field changes are quite simple and are discussed during the time that the code mappings take place.

The culmination of the review period will be the creation of a migration profile that will consist of indexing parameters, data normalization instructions, and code mappings. This document will be sent to the library for review and signature.

As part of our default processing, we will map the patron codes one-for-one and, if so desired, globally remove records such as expired or permanently stopped patrons. Additionally, we also will set incorrect codes to global defaults provided by the library. For example, if the library has five patron category codes, but there are a handful of patrons with blank values in the category codes field, the library can provide us with instructions to globally map a specified code into the blank fields. These records will also be added to a Polaris Patron Record Set to allow the library staff to review them to make any post-migration bulk changes of its own.

If the library has pre-determined or decides during the discovery phase that it would like to customize the migration process to include a reconfiguration of its patron codes, Innovative also can provide this service. This processing can include data cleanup or enhancement such as global zip code changes, normalization of name entry conventions, creation of statistical classification codes, etc.

Circulation Transaction Data Migration

Innovative will migrate the library's current checkout records, circulation year-to-date and lifetime circulation counts, current fines and fees, and current holds (reserves). Migration processing is structured in such a way as to reduce the library's offline period, thereby minimizing the interruption of library operations during the cutover period. Innovative will instruct library staff in the usage of the Polaris offline circulation subsystem during the period where we are converting the circulation transactions to allow the library to continue capturing vital circulation activity.

Other Data Files

Innovative has experience in the conversion of various local databases. If the library has a specific need that has not been detailed in the RFP, we would be interested in discussing possible solutions.

Final Data Processing

For NCPL we recommend performing the data migration in two stages. This will involve an initial cut of the data early in the implementation process followed up by a final full cut of all the data files to be converted just prior to going live on the Polaris system. This allows the library to continue to operate as normal throughout the implementation process. Additionally, the initial conversion period will allow both Innovative and the library to work out any unforeseen issues with profiling, inconsistent data, or other scheduling adjustments that may need to be made without requiring the library to stop cataloging or circulate in an off-line mode.

Typically, we recommend that the library schedule the necessary time and resources to work out the code mappings and profiling with Innovative immediately after the implementation begins. Once complete, the first copy of applicable data files should be sent. We will process the data against the code mappings documents and load the data on the library's new training server. Polaris application training will be performed on the library's own data, giving the library an opportunity to review and approve the initial conversion. Although it is usually not needed, Innovative will do a second test load of

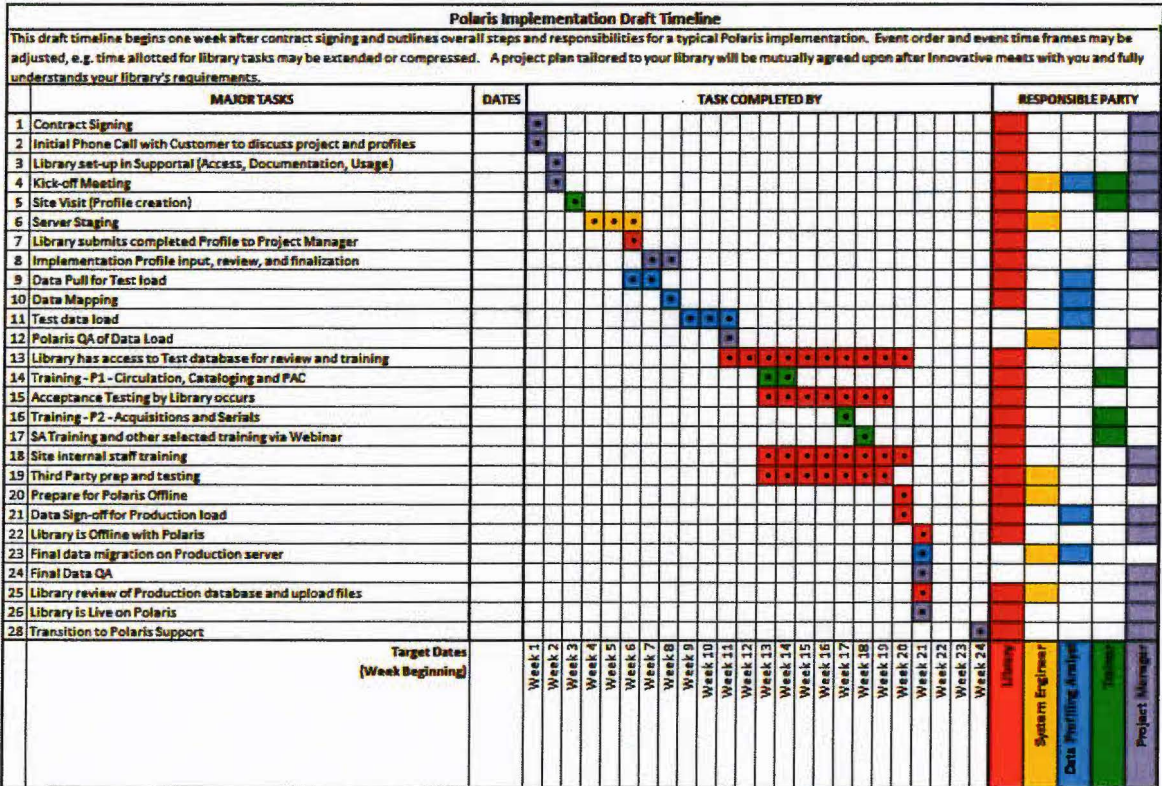
Innovative has experience converting databases from the following vendors/systems:

- GEAC
- Bibliomondo Portfolio
- Book Systems Concourse
- Caspr
- DRA Classic
- Dynix Classic
- Endeavor Voyager
- EOS EOS.Web
- Evergreen
- Follett Destiny
- Follett/Sagebrush Athena
- Gaylord GALAXY
- GEAC Plus
- Highland
- Infovision AmLib
- Inmagic Genie
- Innovative Interfaces Millennium
- Mandarin M3
- Sirsi Unicorn
- SirsiDynix Horizon
- SirsiDynix MultiLIS
- SirsiDynix Symphony
- Sydney Plus
- TLC CARL Classic
- TLC CARL.Solution
- TLC Library.Solution
- Winnebago Spectrum

Additionally, we have converted data from various non-MARC based proprietary systems. Innovative is confident that our experience converting system files from a variety of library automation products with their varied operating systems, data storage and export functions, and proprietary file structures will enable us to effectively migrate the Library's databases.



Polaris Implementation Draft Timeline



Polaris Training Services

Innovative's approach to training is to thoroughly train a core group at the library site. This core group will receive in-depth training on the various subsystems. This core group will, in turn, train the remainder of the library staff. Training materials are provided by Innovative trainers at the time of initial training. In addition, Polaris user guides and help files are available for on-going reference and training purposes. They may be customized as required by the site for local use.

Prior familiarity on Windows is required for all trainees. Up to ten (10) trainees are allowed at each training session. Training materials will be provided for each session. Additional training days can be contracted. Training should take place in a room away from public areas and have the capacity to hold the number of trainees (up to 10) and the Polaris trainer. It is strongly recommended that each trainee have the use of a library workstation with the Polaris Staff client software installed.

Project Consultation:

- 2 days on-site project implementation visit
- PAC Branding
- 2 days on-site "Go Live" assistance

Polaris ILS Application Training: (to occur after system installation and initial database load)

6 days initial on-site training covering the following subsystems; with up to ten (10) trainees allowed per session (number of days may be adjusted based on actual subsystems purchased). Additional trainees, up to a maximum of 15, may be added for an additional cost:

- PAC
- Patron Services
- Cataloging
- Acquisitions
- Serials

Polaris ILS Webinar Training:

- Polaris System Administration interface
- SimplyReports
- You may purchase additional webinar training for products as needed (Feature It, LEAP, etc)

The screenshot displays the 'innovative CUSTOMER SUPPORTAL' web interface. At the top, there is a navigation bar with links for Home, Knowledgebase, Contact Us, Ask the Community, and Open a Ticket. A 'Welcome' banner includes a search bar for articles. Below this is a user profile for 'SierraAdmin@iii.com'. The main content area is divided into several sections:

- Support Resources:** Contains icons for Contact Us, Support Guide, Support Policies, Support Tools, Communications from Customer Support, and What is my support region?
- Release Notes and Upgrades:** Features icons for Release Notes Overview, Current Release Notes, Sample Commitment for Standard Customers, Service Commitment for Vital, Branch Events - Sierra, and Knowledgebase - Enhance.
- Training and Services:** Includes icons for Brochures, Quick Start Guides, Workshops, and Hot Topics Briefings.
- Other Resources:** Lists CS Direct (with a note to click here for access to CS Direct), Links (to Idea Lab, Innovative Developer Toolkit, Innovative Homepage, Innovative Users Group, and Hot Documentation 2.0 and New), and Frequently Asked Questions (covering topics like account creation, support requests, and password recovery).

On the right-hand side, there are three vertical panels:

- Help Desk:** Lists actions such as Add New Ticket, Add New Service Commitment, My Open Tickets, My Closed Tickets, and Escalate Ticket.
- Contacts:** Includes a Manage Contacts link.
- Latest Solutions:** Lists several articles with titles like 'Is it possible to set the "Show Public display" option to display on desktop?', 'Where is the "Service History" section located for other related system sections like support?', 'Moving the application for Sierra Maintenance (2nd 8.3)', and 'ACP ALL Developer View: Is it possible to increase the display options in terms of all services?'.
- Latest Forum Questions:** Features a 'SCHEDULED MAINTENANCE NOTICE FOR SIERRA' alert.
- Recent Activity:** Shows a list of questions with titles such as 'Can I see how many tickets are active?', 'Can I see the "Hot Topics" section of the Sierra Web Site?', 'Can I see the "Hot Topics" section of the Sierra Web Site?', 'Can I see the "Hot Topics" section of the Sierra Web Site?', and 'Can I see the "Hot Topics" section of the Sierra Web Site?'.

Ticket Prioritization Process

Ticket priority is determined using the following urgency classifications:

- **Site Down Requests:** Site down service requests are given top priority with goal of immediate resolution given pending circumstances. These include system urgent problems such as the software is in a non-responsive state, stopped transaction processing, and instances of non-functioning primary modules (e.g., circulation, acquisitions, serials, cataloging, public catalog) which severely affect library productivity or operations.
- **Critical Service Requests:** Critical service requests are issues affecting the use of the module or the data that is hindering operations, such as, but not limited to: excessively slow response time, functionality degradation, error messages, or backup problems. These service requests are typically resolved within two business days.
- **High Priority Service Requests:** High priority service requests are typically resolved within one business week. These service requests include secondary functionality problems such as issues that prevent Library staff from performing main component of job or that prevent patrons from accessing significant features of the catalog.
- **Routine Service Requests:** The target resolution period for routine service requests is by the next software release or sooner. This includes reports of software bugs and reports of errors in system documentation. On average, Innovative has one full system product release per year as well as separate annual release schedules for premier products, which vary based on the needs of Innovative's Library partners.

Additional Support Features

In addition to traditional help desk services, Innovative offers a variety of additional support features. These features include Innovative's fully-navigable documentation and a growing knowledgebase of Customer Support solutions. This knowledgebase repository provides solutions to frequently asked questions, how-to instructions, and answers to common support tickets.

A host of independently run user groups are an additional source of interactive feedback to learn more about Innovative products. Innovative has partnered with the Innovative Users Group (IUG) on a process for customer-driven innovation managed through our Idea Lab. This collaborative online forum uses a "challenge" model to solicit Innovative user feedback and help prioritize new developments and enhancements to existing products.

Confidential Quote

Your quote can be found on the following pages. Please note that Innovative's quote is confidential.



Pricing Exhibit **CONFIDENTIAL**

Page 1 of 2

Innovative Interfaces Incorporated
 1900 Powell St.
 Suite 400
 Emeryville CA 94608
 United States

Date 4/10/2019
Quote # EST-INC9532
Payment Terms Net 30
Overall Contract Term (Months) 60
Contract Start Date
Contract End Date
Sales Rep Carrie Pearson
Site Code
Expires 3/1/2020

Bill To
 Nassau County Library
 25 N 4th St
 Fernandina FL 32034-4123
 United States

Ship To
 Nassau County Library
 25 N 4th St
 Fernandina FL 32034-4123
 United States

Currency
 US Dollar

Item	Item Category	Qty	Description	Options	Unit Price	Amount
Polaris Success Bundle - Public		1	Polaris Public Success Bundle Polaris is an integrated library system solution to manage physical and digital resources and library patron accounts. Combines library operational workflows with open architecture and APIs for integration with external systems. Cloud hosted solution with web interface. Supports staff tasks and patron access services. Public Success Bundle includes Core Bundle functionality and adds: eContent Integration, Carousel, Outreach, up to 10 SIP2 Licenses, Community Profiles, Staff-Facing eCommerce, Integration with 3rd Party Vendors & RESTful APIs.			18,000.00
Staff User Licenses	License - Term	20	The Polaris Staff Client is licensed software that allows the end user to access all of the Polaris functionality based on the permissions that are set in System Administration. This includes Circulation, Patron Services, Cataloging, Acquisitions, Serials, Utilities and System Admin. Additional License for additional Staff User License. A separate staff user license is required for each concurrent connection made from a staff client to the Polaris ILS server, including from Polaris Web Application (aka Leap).		239.99999998	4,800.00
Polaris Multi-Tenant Hosting - US/APAC	License - Term	1	Multi-Tenant Cloud Hosting environment for Polaris in production enables libraries to eliminate the overhead of maintaining an on premise server for Polaris ILS. When Polaris is hosted, Innovative takes responsibility for release upgrades, backups, and system / environment maintenance & security updates. Includes Terminal services, PAC services, Reporting services, Screwdriver services		4,320.00	4,320.00

Polaris Success Bundle Description

Acquisitions with EDI ordering
Includes Titles to Go

Cataloging with Authority Control
Export Express

Circulation including classic Inventory
ILL
Collection Agency
Offline Circulation
Notices
SIP 2 Interface – 1 license
SMS Alerts
Volume Level Holds
Patron Images
SIP 2 – 5 License
Self Check – 5 License

Homebound
RFID Integration
eContent Integration (Overdrive, Cloud Library, Axis 360)

Polaris Response PowerPAC
Kids OPAC
Patron Self Registration
FeatureIT
Remote Patron Authentication
Carousel Toolkit
Community Profiles
MyLibrary App

Serials Control
Polaris Simply Reports Web-based reporting
MSSQL reporting

Polaris Success Bundle Implementation Services Description

Innovative utilizes a five (5) stage Implementation Process to ensure a smooth & successful implementation that incorporates the learning experience of over 9,500 implementations for libraries in 66 countries around the world. The Methodology incorporates all of the necessary components for a successful project including:

- Project planning and staffing
- Project planning templates (schedules, requirements documents, budgets, etc.)
- Industry best practices for system setup
- Client communications including project plans, status reports, and status meetings.
- Use of a client collaboration tool
- Techniques, tools, and deliverables to accelerate implementations
- Quality assurance & testing
- Training & Change Management services

The Scope of the project includes the following set of professional services:

- **Setup the software and hosting environment** for the Client to access the Polaris ILS.
 - Polaris Success Bundle
 - Acquisitions
 - EDI - Electronic Ordering
 - EDI - Electronic Invoicing
 - Titles to Go
 - Selection Lists
 - Cataloging
 - Automatic Authority Control
 - Export Express
 - Z39.50 Client, Broadcast & Server
 - Circulation
 - Classic Inventory Control
 - Collection Agency / Debt Collection (Unique Management)
 - Digital Signatures
 - eCommerce - PowerPAC (Payflow Link)
 - Self-Check using Express Check
 - Floating Collections

- **Project Management Services** to manage the Innovative services team, coordination of the technical services required to configure the software, delivery of project plans with periodic updates, project budgets tracking both hours and costs incurred, client communications and status reports and management of change orders as required.

SOW covers:

- Up to 2 days of onsite profiling services
- **Software Configuration** services to adapt the fully functional out of box software to the clients' unique needs.
- **Data Migration Services** to migrate the client's data from their existing ILS into the Polaris ILS. These services include extraction, analysis, mapping and loading of data into the Polaris Test Database. Revisions to the Polaris Test Database will be made, when possible, as issues are reported during the evaluation period. Includes Consulting, Profiling, Loading for: Bibliographic, Authority, Item, Patrons, Serials Holdings, Circulation Checkouts, Holds, Fines and Vendor records. Includes up to 2 data loads.
- **Training Services** to be delivered through a combination of on-site visits and web-based sessions. Training topics will be detailed in the schedule during the preparation phase based on library go-live priorities and target dates.

SOW covers:

- Up to 10 days of training onsite at the library's location
 - 4 Days of Patron Services Training (Onsite)
 - 2 Days of Acquisitions Training (Onsite)
 - 1 Day of Serials Training (Onsite)
- Up to 23 hours of instructor led online training
 - System Administration
 - Simply Reports
 - Community Profiles
 - Outreach Services
 - Export Express
 - Feature IT
 - ILL

Quote # 2

**Nassau County Board of County Commissioners
Request for Quotation Form**

Requesting Department: Nassau County Public Library **Date:** 12/16/2019
Department Address: 25 North 4th Street
Fernandina Beach, FL 32034
Contact: Claire Shepherd
Contact email: cshepherd@nassaucountyfl.com
Department Phone: 904-530-6503
Department Fax: 904-277-7366

Product(s)/Service(s) to be purchased (list all specifications and requirements):

Fully Integrated Library System Software
Please see Attachment A for detailed specifications and Requirements

*** All charges must be on your quotes in order to be considered and This RFQ must be filled out, signed and returned to be considered. Nassau County Does not Fill out Credit Applications. Payment is per Florida Statutes 218.73 & 218.74**

Please submit written response by: January 3, 2020
(Date)

To be completed by vendor:

Vendor Name The Library Corporation
Address: Research Park
Inwood, WV 25428
Phone: 800.325.7759
Fax: 304.229.0295
Contact: Phillip Green
Email: pgreen@tlcdelivers.com

Attached is a written quote from our company, which is valid for 30 days.

Debra K Bowers 12/27/19
Signature **Date**

Comments:



References for Nassau County Public Library RFQ

West Florida Regional Library

239 N Spring Street
Pensacola, FL 32502
TLC Customer since 2015
Sites: 7
Collection: 365,000 items
Annual Circulations: 750,000
Contact: Mr. Felix Hotard, IT Manager
[Email: fyhotard@mywfpl.com](mailto:fyhotard@mywfpl.com)
Phone: (850) 436-5055

Solutions include: Library•**Solution**, ITS•**MARC**, OSA, Multi-Lingual OPAC, SIP Software with Envisionware integration, eCommerce, Serials and OPAC Enrichment.

Bay County Public Library

898 W 11th Street
Panama City, FL
TLC Customer since 1987
Sites: 7
Collection: 319,000 items
Annual Circulations: 445,000
Contact: Ms. Robin Shader, Director
mrshader@nwrls.lib.fl.us
Phone: (850) 522-2109

Solutions include: Library•**Solution**, OPAC Enrichment, SIP server, eCommerce, Acquisitions, Z39.50, ITS•**MARC** with premium datasets, and EnvisionWare integration.

Walton-DeFuniak Library

3 Circle Drive
DeFuniak Springs, FL
TLC Customer since 2002
Sites: 4
Collection: 110,000 items
Annual Circulations: 120,000
Contact: Mr. Dan Owens, Director
mowedan@co.walton.fl.us
Phone: (850) 892-3624

Solutions include: Library•**Solution**, ITS•**MARC** with premium datasets, and OPAC Enrichment.

Hendry County Library System

120 W Osceola Ave
Clewiston, FL 33440
TLC Customer since 1999
Sites: 3
Collection: 105,000 items
Annual Circulations: 45,000
Contact: Ms. Natasha Hayes, Director
mnatasha.hayes@clewiston-fl.gov
Phone: (863) 983-1493

Solutions include: Library•**Solution**, Multi-Lingual OPAC, SIP server, and OPAC Enrichment.

Maitland Public Library

501 South Maitland Ave
Maitland, FL 32751
TLC Customer since 1993
Sites: 1
Collection: 93,000
Annual Circulations: 108,000
Contact: Ms. Stacie Larson, Director
mrlarson@maitlandpl.org
Phone: (407)647-7700

Solutions include: Library•**Solution**, Multi-Lingual OPAC, SIP server, eBook Integration, Serials, and OPAC Enrichment.

Pricing Quote

**RFQ Response
for**

Nassau County Public Library



Solutions that Deliver



Submitted by:

The Library Corporation

Research Park

Inwood, WV USA 25428

Federal Identification No.: 52-1043428

Toll-Free: 800.325.7759 Fax: 304.229.0295

Visit: TLCdelivers.com

Stability • Excellence • Unparalleled Service

Cover Letter

Claire Shepherd
Nassau County Public Library
25 North 4th Street
Fernandina Beach, FL 32034

Dear Ms. Shepherd:

The Library Corporation (TLC) is pleased to provide this quote to Nassau County Public Library for TLC's dynamic, interactive and collaborative next-generation library automation system, Library•Solution.

TLC has been providing reliable library automation and data services for more than 40 years to libraries just like yours. We provide best-in-class services to assist our clients in achieving their automation needs and help them focus their attention on where it truly matters: their patrons. We're unique in that we are one of the only remaining privately held ILS vendors. TLC takes pride in this fact because we operate and continue to grow in a very mature market that is constantly in a state of change due to takeovers and mergers. We're able to provide unparalleled customer support that is among the best in the industry. TLC also provides software updates that outpace our competitors. We consistently deliver updates that meet the requirements of our customers and we do it on time.

At TLC we go beyond basic services and are committed to the bigger picture. We make it a priority to work closely with each client to understand your mission, vision, strategy, and goals for your library. Moreover, our system design and interfaces will assure you of TLC's ability to fulfil your needs in the future as technology continues to evolve and your library continues to grow.

Take, for instance, TLC's new LS2 Cataloging. Our customers spoke and we listened. LS2 Cataloging presents libraries with a new set of intuitive tools, for bibliographic editing and copy management, all scaled for a range of expertise and expectations, from beginner to advanced. This new cataloging application provides the tools allowing untrained catalogers to quickly and easily produce content rich and robust MARC records while providing data integrity. This leads to better user experience from staff and patrons during the search, browse and discovery workflows. LS2 Cataloging establishes a new benchmark in cataloging, paving the way for RDA standards and transition to BIBFRAME through a linked data approach to bibliographic editing.

We look forward to working with you to further demonstrate TLC's ability to meet your library's needs and build a long-standing relationship as your technology needs grow and evolve.

Sincerely,



Phillip Green, SE Sales Representative
Phone: (800) 325-7759
Email: pgreen@tlcdelivers.com



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Company Statement

For over 40 years, The Library Corporation has provided unrivaled library software technology and support services to all types of libraries. We provide services that range from single-site installations to large urban libraries, to school districts, and consortia's around the United States. TLC remains stable and dynamic in a consolidated library software landscape.

TLC was established in 1974 with one purpose: to serve libraries with advanced technology solutions. We stand out in today's market of vendor takeovers because our founder still owns and operates TLC. Our employees and product developers recognize that librarians do more than keep track of their collections, but they also build life-long learners in their communities and in our shared society.

To us, your library is more than a building with shelves of books, but represents an apex of information for your patrons in a rapidly changing universe of ideas. Every member of our team at TLC is committed to developing and maintaining technologies that will ensure your communities have access to the information they need.

The history of TLC in the library technology industry is a testament to the highest product standards we require from our suppliers and manufacturers. Our TLC•SmartTECH product line is the latest endeavor we've embarked upon for our customers, providing a single source to meet additional technology and audio/visual needs. With TLC, you can find 3D printers, drones, robotics, AR/VR bundles and other carefully curated STE(A)M related products and services. Our diverse team offers our customers the curriculum and consulting services to turn their Makerspace dreams into a reality.

We seek to create lasting partnerships with our customers, using our valuable relationships alongside our unparalleled customer service to continue creating modern and dynamic library software solutions that respond directly to our customers' needs. Throughout this pricing quote, you will be able to read from our current customers about how steadfast our commitment is to you when you partner with TLC.

TLC's cumulative products are deployed in more than 1,100 organizations, representing over 5,500 locations in North America. When you partner with TLC, you're assured of product continuity, on-going development and support, and corporate stability unmatched throughout the industry.

Our team works continuously to update our enterprise software products, ensuring you have state-of-the-art technology when using Library•Solution, CARL•X¹, TLC Device Management, ITS•MARC bibliographic databases, Cataloger's Reference Shelf, and integrated software solutions for RFID-related technologies.

TLC is here today and tomorrow. We are a company that you can depend on.

¹ The CARL•X ILS serves large metropolitan libraries and consortias.



Cost Summary

Library•Solution Software

Library Sites	5
Staff Workstations	28
Reports Licenses	5
Bibliographic Records	126,501
Annual Circulation	224,181

The costs in this proposal are guaranteed for 30 days.

Software Description	Annual Cost years 1-5	Annual Cost year 6+
LIBRARY•SOLUTION® INTEGRATED SOFTWARE PACKAGE <ul style="list-style-type: none"> • LS2 Staff (Circulation) • LS2 PAC (OPAC) • LS2 Kids (OPAC designed for children) • Oracle Database Licensing • Library•Z (Z39.50 server) • LS2 Reports (one license per site) • LS2 Cataloging with Serials control 	\$17,460	\$10,185
ITS•MARC® One of the largest, most current copy cataloging resource pools available, with two access methods: World Wide Web and Z39.50. ITS•MARC provides access to over 20 million MARC records.	\$995	\$995
OPAC Enrichment Enrich your OPAC with a subscription to enhanced content (book jackets, book reviews, and more). A search of the library catalog simultaneously searches TLC's server and integrates content into your OPAC results.	\$1,026	\$1,077
SIP Software SIP Version 2 with extensions is a protocol that enables Library•Solution to communicate with 3rd party applications. Price is valid only for TLC certified vendors.	*\$720	\$419
Online Selection & Acquisitions™ Online Selection & Acquisitions (OSA) is a comprehensive solution that supports all aspects of collection development, acquisitions, fund management, and order management.	*\$999	\$629



TLC Hosting Services	Annual Cost years 1-5	Annual Cost year 6+
TLC Hosting (consists of one-time setup fee) All above features and services with the addition of TLC Hosting. TLC Hosting was designed to offer our products to libraries who desire a higher level of outsourced server hardware service and support.	\$5,300	\$5,250
Implementation Services Description	First Year Costs	Annual Costs
Project Implementation Services (\$6,235 total) <ul style="list-style-type: none"> • Authority Control • Custom OPAC Design • Rules Configuration • Migration of Data • Data Clean-Up • RDAExpress retroactive conversion of your existing MARC records to the new RDA cataloging standard. 	*\$1,247	n/a
Authority Control Processing and Ongoing Updates <ul style="list-style-type: none"> • Authority Control at Implementation • Automatic Updating • Ongoing Access to National Authority Files • Global Updating 	Included	Included
4 Days Onsite Training (\$6,000 total) Onsite, formal training for the TLC trainer to train library staff at a location determined collaboratively between TLC and the library. Note: this includes "Go-live" assistance.	*\$1,000	
TOTAL COST FOR SOFTWARE AND SERVICES:	\$24,777	\$18,555

Payment terms: 25% due at signing with remainder due net 30 following installation.

*Reflects a charge which is evenly spread across years 1-5 to lower initial cost of purchase.



Library•Solution Software Info

The System Best Designed For Your Library

Navigating a library automation system should not require a working knowledge of cryptic icons, confusing menus, and multiple windows scattered on the screen. Doesn't your library deserve better? TLC's expansive list of user-requested features is carefully and purposefully presented to your staff and patrons in easy-to-use AND easy-to-learn interfaces.

Highlights include:

- Web-based automation
- Touchscreen-optimized interfaces
- Tablet-friendly functionality
- Easy access to e-books and other digital resources
- Integrated technical processing and cataloging tools
- Specific and separately designed OPACs for children and adults
- Advanced searching and ad-hoc reporting for every staff member
- Automatic authority control and updating
- LS2 Reports powered by IBM Cognos
- Real-time inventory
- Customizable interfaces
- Automatic backups
- Configurable security
- Minimal system administration
- Single Sign-On powered by Active Directory™ integration (Optional)
- Interactive, dynamic bookshelf for your library's titles

Installed on your servers or implemented online via TLC Hosting, Library•Solution is an easily maintained, affordable investment that will pay dividends for years to come.

“Other systems we looked into were too complex. We like the fact that TLC is Web based, which is great for our smaller libraries who, for the most part, are staffed by non-technical people. The ease of use is fabulous...very clean & manageable.”

- Barb Shultz, Fort Dodge Public Library



Project Implementation Services

The success of your migration to a new integrated library system (ILS) depends on the successful conversion of your data. We have extensive experience reading and processing machine-readable records in MARC II communications format, as well as in several other formats. We have converted users from dozens of library systems, including Millennium, Polaris, Sierra, Horizon, Symphony, Auto-Graphics, and others.

Our customers believe TLC excels in customer service – this starts at the time of implementation and throughout the TLC experience.

The charge for Project Implementation Services includes the following:

- **Authority control** - TLC will match each of your records against the national authority files and update subject headings and author fields accordingly. This will result in a cleaner, more standardized catalog that helps your patrons find the materials they're looking for.
- **Custom OPAC design** - TLC will provide all programming to create multiple OPAC interfaces, including adults, kids, staff, and union catalog interfaces.
- **Rules Configuration** - TLC will configure all circulation and patron rules based on library's specifications. The system will be delivered ready to check out books!
- **Migration** of existing bibliographic data. Conversion of transaction files if desired.
- **Data clean-up** and normalization
- **RDA Conversion Service** - RDAExpress converts your existing MARC records to the new RDA cataloging standard.

“Every single person I have ever talked to at TLC has our library’s best interests at heart. They are collectively and individually a wonderful asset.”

- Ruth Hayden, *Smyrna Public Library*



Automatic Authority Control

TLC recognizes that English is a living language that is constantly updated in dictionaries and throughout library catalog headings. Keeping headings up to date enables patrons to find materials using current terminology.

Standardized headings also guarantee that a patron searching for a particular topic will find *all* of your books on that topic—not just some of them.

Library Problem

You just don't have the time to constantly update your MARC records. It's time consuming and expensive to stay up-to-date with current changes.

Library•Solution

- Authority Control at Implementation that cleans up your records and makes them consistent.
- Automatic Updating with weekly system checks, scanning for updates and **automatically** fixing records in your catalog.
- Your library will have ongoing access to the national authority files.
- Global Updating, so any authorized staff members can instantly update *all* MARC records with a new heading.

...offered by TLC at no additional charge!

“I'm a total TLC fanboy and will never, ever switch ILS providers...TLC support is truly superior in this day of automated responses and unhelpful knowledge bases.”

- Gina A. Emory, *East Bonner County Library District*



TLC Support

As our customers attest, The Library Corporation sets an unreachable standard against our competitors for customer service within the industry! At TLC, we offer only one level of support, and that's 24 hours a day, 7 days a week, and 365 days a year. For over 40 years, our main focus has been exceptional customer service.

TLC's goal is to meet and exceed the expectations of every customer by providing trailblazing, live customer service. We believe our commitment to superior customer service separates us from the competition within the industry today. What does great customer service look like? For TLC, it's all about our customer's experience and their success with providing a rewarding library experience for their patrons. Our clients repay our efforts with loyalty, with some of our customers choosing TLC for over 30 years. When you partner with TLC, you're assured of product continuity, ongoing development and support, and corporate stability. We're a company you can depend on.

Full help desk access is available from 6:30 a.m. to 9:00 p.m., Eastern Time, Monday through Friday. All support calls are personally answered (no voice recordings) via toll-free telephone lines. After hours support is available 24 hours a day, 7 days a week at no additional charge.

TLC also offers an Online Support Center (OSC) for our customers. This web-based tool provides a direct interface between customers and TLC's Support Staff.





Customers may log in to report an issue or to review the status of any previous or existing issues. Each time an issue is updated by TLC staff, you are automatically notified of the updated status via email.

Questions are prioritized based on the severity of the issue. Critical issues that affect your ability to deliver services to your patrons or staff receive the highest priority and attention. The system is designed to ensure that issues are constantly tracked until resolution, automatically reviewing any outstanding issues to get them to the attention of senior management, if they are not resolved promptly. Each issue in the system remains an "open ticket" until the customer is fully satisfied and "closes" the ticket.

Support may also be found at our new password-protected website for Library•Solution customers, **LS•Community**.

First year support is included with the initial purchase of Library•Solution software and TLC-supplied hardware. Support is provided from TLC's Headquarters in Inwood, WV and is included in your annual maintenance cost.

Contacts And Services

Direct Assistance
TLC's Support Department in Inwood, W.Va., is staffed from 6:30 a.m. to 9 p.m. Monday through Thursday and 6:30 a.m. to 7 p.m. Friday. That means customers talk to a person, not an answering machine. After-hours emergency support is available 24 hours a day, seven days a week.

- Technical Support: 800.852.4911 or 304.229.0100
- Emergency After-Hours Support: 800.852.4911

Online Assistance
Service requests may be submitted at any time through TLC's Online Support Center. Customers also have the option to email or fax TLC's Support Department.

- Online Support Center: www.TLcdelivers.com/helpdesk (login required)
- E-mail: support@TLcdelivers.com
- Fax: 304.229.0295

“TLC is so awesome—how many places actually give you a real live person that answers your calls?”

- Tiffany Crayne, *Greenwood County Library*



Training

- 4 days of onsite, formal training by one TLC trainer to train the staff, at a single location collaboratively determined by the library and TLC.
- 1 day of onsite assistance immediately following the formal training period by a TLC trainer to answer questions and assist staff as they work with the new system
- All travel related expenses are included within the training costs in the cost summary.
- Access to the LS•Community site, which empowers you to receive as much—or as little—information from TLC as you choose.
 - For now, you have the option to sign up for email notifications regarding product announcements, newsletter updates, and helpful tips. When the user forum is implemented, you'll be able to choose which customer conversations you want to follow, if any. Visit the site regularly to learn what's new in product development, view archived webinars or sign up for upcoming online sessions, watch training videos, submit support tickets, download user guides and product literature, and much more.
 - Library directors have sole discretion when it comes to assigning site permissions to additional library staff members. This training is also available prior to installation to help staff become familiar with the software before formal training.
- *OPTIONAL*: Remote follow-up training to occur 3-6 weeks after installation (\$750 per half day session)
- *OPTIONAL*: TLC can provide advanced training for personnel who will provide troubleshooting support. Onsite-\$1500 per day; Remote-\$750 per half day session

The effectiveness of the training is one of the most important factors in determining how comfortable your staff will be with your new system, and therefore, how successful your migration will be. TLC customizes a training package for each system we implement. The length of the training is based on the number of staff to be trained, whether the system prefers “train the trainer” or direct training of staff, previous automation experience, and any facilities available for training. TLC’s Training Manager will work with you to design a custom training package. Our emphasis on effective training has resulted in a multifaceted approach designed to ensure staff comfort with the new system, and we will modify this training package based on your specific needs and desires.

“It’s been more years than I can count since TLC said they’d worry about the tech so that I could concentrate on my customers. Support has delivered superior caring about how this library operates every day of all those years. They went above and beyond in a 2007 hurricane that closed the library for a week, and when they were hammered by their own severe hurricane, their attention was still on providing tech so I could be with my customers.”

- Jane Tucker, *Astoria Public Library*



TLC Hosting Overview

As an optional service, The Library Corporation offers hosting for an additional cost, outlined in the Cost Summary. TLC Hosting services are designed to offer our products to libraries who desire a higher level of outsourced server hardware and support.

Hosted Service & Maintenance include:

- State of the art hosting facilities with redundant data communication lines and load balancing to ensure the best performance.
- All security and virus protection.
- Nightly backup
- Database monitoring
- Operating System updating
- Database configuration and updating
- TLC Software updating
- The fastest possible response time for any server-related issues

TLC provides protection against the most common causes of outages (power spikes/failures, fire, and flood), and our data center environment is a resilient, secure and redundant business class data center. This location is managed by AT&T and features high-bandwidth, auto-failover connections, and maintains a 99.5% uptime.

In the event of an unrecoverable, localized disaster, such as an equipment malfunction, the customer's hosted solution would be restored to a standby server and any lost data would be restored from the nightly backups.

Should we experience a disaster that would affect the entire data center, operations would be temporarily relocated to our corporate data center located at our Headquarters in Inwood, WV.

“We like the fact of hosting being offered with TLC. The product(s) are very easy to use and extremely reliable. User security is absolutely wonderful!”

- Mary Sizemore, High Point Public Library



Hardware Recommendations

Optimal Recommended Hardware Specifications

2 total Virtual or Physical Servers:

- 1 Virtual or Physical Web Server for LS2 Products, 32 GB RAM, Dual 6 Core 2.6GHZ Processors, 600GB Usable Hard Drive Space.
- 1 Virtual or Physical Data Server, 16 GB RAM, Dual 4 Core 2.6GHZ Processors, 600GB Usable Hard Drive Space.

Workstations

- Circulation: Web-based
- OPAC: Web-based
- Acquisitions: Web-based
- Reporting: Web-based
- Cataloging: Web-based
- Inventory: Web-based live inventory. Requires a networked device (handheld, laptop, pc) running a browser.
- Offline Circulation: Client software with auto-updating.
- Bookings: Basic booking available web-based. Advanced booking requires self-updating client software.
- Administrative Interface: Web-based.

Browser Support

TLC's web-based applications are developed and optimized for the following browser versions:

- **Chrome** – Due to the accelerated rate at which updates are released, TLC will support the latest three versions.
- **Firefox** – Due to the accelerated rate at which updates are released, TLC will support the latest three versions.
- **Internet Explorer** – TLC will support the latest three versions. Note: Compatibility mode is only supported in LS2 Reports.
- **Microsoft Edge** – Due to the accelerated rate at which updates are released, TLC will support the latest three versions.
- **Safari (MAC only)** – The latest two versions will be supported.

Please note browsers interpret CSS and HTML standards differently; therefore, certain features may display differently based on the individual browser and selected plug-ins.

The Library Corporation's web-based applications may continue to function in versions that are no longer supported, but TLC will only consider addressing issues that are present in the versions that are covered above.

Note: TLC will help you determine if your existing hardware can be used with Library•Solution.



Optional Software and Services

Please contact your sales consultant for pricing.

Software and Service Description	First Year Costs	Annual Support
SocialFlow Cadence Optimized Publisher™ (2 handles) SocialFlow Cadence Optimized Publisher™ offers automated and scheduled delivery of pre-packaged content, measurements of effectiveness, and real-time analytics on campaign efficacy through the libraries and/or Schools Facebook, Twitter, Google+, and LinkedIn accounts.	\$12,500	\$10,000
Library•Serial™ (Serials Control module) Designed to help librarians handle many aspects of serials control such as checking in issues, returning unneeded or duplicate issues, claiming missing issues, and printing configured labels.	Included	Included
eIntegration for Borrower Services (OverDrive, Mackin, or Baker & Taylor) Allows for placing holds, checking out titles, and viewing and interacting with the titles in 'My Account'. eIntegration for Borrower Services allows patrons to interact with eBooks without having to leave the library's OPAC.	\$500 \$1,000 \$1,500 \$2,000 \$3,000 \$4,000	\$500 \$1,000 \$1,500 \$2,000 \$3,000 \$4,000
NCIP NCIP is a protocol that enables Library•Solution to communicate currently with ILL systems including SirsiDynix URSA, Auto-Graphics, OCLC, Innovative InnReach and others. Price is valid only for TLC certified vendors.	\$1,500 \$2,500 \$4,000	\$300 \$500 \$800
Active Directory / Single Sign On (SSO) Library•Solution utilizes Microsoft's Active Directory™ (AD), Microsoft's Active Directory Federation Services 2012 R2 (AD FS 3.0), and Security Assertion Markup Language (SAML) 2.0 to provide users a Single Sign-On (SSO) solution.	\$4,999	\$4,999
Active Directory Integration TLC utilizes Active Directory to allow log ons to staff modules without the user having to remember yet another set of credentials to access Library•Solution. The •Solution application communicates with your organization's Active Directory to authenticate the user. Active Directory also allows for a single database of user or group privileges which define staff access and privileges	One Time Set Up \$1,999	N/A



<p>Digital Content Integration</p> <p>LS2 PAC will index, search, and display digital content integrated with catalog results for any OAI compliant repository. Users will see records for both the library catalog and digital content in the result list. Thumbnail images will appear in place of books jackets for these records, and searches maybe filtered by a separate facet e.g. the RSS news feeds facet option. In the record display, users will see deep links back to CONTENTdm or be able to display data for most common formats (image, sound, video) in the LS2 interface or browser.</p>	<p>\$500 \$1,000 \$1,500 \$2,000 \$4,000</p>	<p>\$500 \$1,000 \$1,500 \$2,000 \$4,000</p>
<p>eCommerce</p> <p>This functionality will allow the library to collect funds for fees or fines using credit cards from the LS2 PAC interface using the Authorize.net authorization service. Credit cards will not be stored on the library site.</p>	<p>\$1,999</p>	<p>\$199</p>
<p>Debt Collection Module</p> <p>Debt collection interface with Unique Management Services, Inc. Includes reports and first year support.</p>	<p>\$1,999 \$2,999</p>	<p>\$399 \$799</p>
<p>Reports Authoring License</p> <p>This license enables staff to create fully formatted reports, graphs and notices. The program uses a specially prepared data framework that presents Library•Solution data in clearly labeled fields. Requires Training.</p>	<p>\$2,000</p>	<p>\$500</p>
<p>Reports Authoring Training (2 days)</p> <p>Covers an introduction to Report Manager, report management through Cognos Connection, and basic and intermediate report building techniques and ways of enhancing, customizing, and managing professional reports in Report Studio.</p>	<p>\$3,000</p>	<p>N/A</p>



TLC • SmartTECH

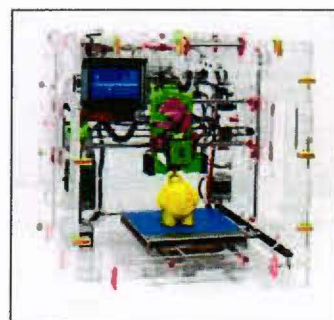
TLC's SmartTECH has cultivated a collection of premium brands that provide you and your library with a single source that meets all your technology and audio/visual needs. Since 1974, we have been committed to delivering cutting-edge enterprise software backed by unrivaled customer support. TLC's cumulative products are deployed in more than 1,100 organizations, representing over 5,500 locations in North America. To learn more and get the latest news on our SmartTECH line, follow us on Twitter at [@TLCSmartTECH](https://twitter.com/TLCSmartTECH).

Turing Tumble

This high-tech hands-on, STEM-based learning tool builds logic, critical thinking skills, and fundamental coding concepts. Turing Tumble provides a way to peek under the hood of computers: the logic isn't hidden inside a computer chip, it's right there in front of you, no electronics at all.

JellyBox 3D Printer - kit

JellyBOX takes 3D printing to the next education level by having the user build the actual printer! There is no better way to learn 3D printing in-depth than to build your own machine!



C-Pen Reader Pen

Ideal solution for struggling readers The C-Pen Reader pen scanner is a major technological breakthrough for anyone learning English, Spanish or French and is a life-saver for those who suffer from reading difficulties such as dyslexia.

Circuit Scribe – Circuitry Kits

Let your creativity merge with science as you build exciting circuits using our Circuit Scribe conductive ink pen, sweet magnetic modules, and plain old printer paper. TLC also provides the Everything Classroom kit, Intro classroom kit, and the DIY Drone kit.



For more products that will help turn your Makerspace dreams into a reality, please visit <https://tlcsmarttech.shop/>.





When it comes to keeping our customers informed of our latest products and updates through social media, none of our competitors come close!

Social Media

Source: Facebook analytics, Dec. 2018

By following us on Facebook and Twitter, you'll have access to new content, products, and information faster than that of any library software provider in the industry. You'll also get the latest news from ongoing conferences that we're participating at, as well as be able to follow with our team for chances to enter contests and win prizes.

In November 2018, at TLCU, an annual conference hosted by The Library Corporation, we put on an assortment of contests and giveaways through social media, awarding our customers with products from our SmartTECH line. Customers that tweeted #TLCU2018 won prizes like the Turing Tumble and Ozobot kits, Blocks Rocks, and more! Don't miss your chance to win these fantastic products and get the latest updates from our team by following us today!



Click the icon to follow TLC on Twitter!



“Every single person I have ever talked to at TLC has our library’s best interests at heart. They are collectively and individually a wonderful asset.”

- Ruth Hayden, *Smyrna Public Library*

TLCdelivers.com

**PROVIDING OUTSTANDING
AND UNPARALLELED SERVICE
TO OVER 5500 LIBRARIES
SINCE 1974.**



Get in touch

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