

CHARLOTTE MECKLENBURG

LIBRARY

**Request for Proposals
Library Engagement Technology Tools
for
Charlotte Mecklenburg Library
Issued April 29, 2026**

**Proposals Will Be Received Until
2:00 PM EST May 28, 2026**



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Introduction

Charlotte Mecklenburg Library (“Library” or “CML”) is seeking proposals from qualified vendors to provide a suite of technology tools to help with Library engagement. This will include:

- Events Calendar
- Room Reservation System
- Schedule Librarian Appointments
- Mobile App

The Library reserves the right to award any individual module independently to one or more vendors. Each module must be fully functional and supported as a standalone solution, regardless of whether it is part of a broader vendor suite.

About

Charlotte Mecklenburg Library is one of America’s leading urban public libraries. Located in Mecklenburg County, the library system serves a diverse community of over one million citizens through 21 branches and on-line services. Since our founding in 1891, and as an original Carnegie Library in 1903, our role as a provider of lifelong education and learning in this community has never been more relevant.

CML is beloved by many, with 70% of Mecklenburg County residents stating that they had visited a Library location in the last 12 months. There were over 2.6 million visitors to the various Library locations in Fiscal Year 2025.

The Library has 482 full and part-time employees, along with an extensive volunteer network that engages more than 1000 people throughout the year. For FY2026, operating expenditures totaled \$55.7 million.

Charlotte Mecklenburg Library is currently developing a new strategic direction for FY26-28, with a major component being the opening of a new Main Library. The iconic new Main Library will be the flagship of the system; a free, open, and accessible information hub for all as well as a destination for local, regional, and national engagement.

Mission, Vision, Values & More

Our mission is to improve lives and build a stronger community. Charlotte Mecklenburg Library envisions itself as the essential connector of a thriving community of readers, leaders, and learners. We value learning, openness, respect, inclusion, and leadership. Our brand promise is to be accessible and welcoming to all while celebrating and supporting the joy of reading and learning, fostering exploration and personal growth, and connecting individuals to each other, the community, and the world.

We believe wholeheartedly in intellectual freedom. The Library is committed to protecting the First Amendment’s guarantee of free and open access to information and ideas—a principle vital to our democracy and to each individual’s search for knowledge. We seek to provide our diverse community with a comprehensive collection of materials, services, and programs providing a wide range of knowledge and perspectives.

Scope

The Library is seeking proposals from qualified vendors to provide an integrated, user-friendly suite of digital engagement tools that enhance the patron experience across online and mobile platforms. The solutions should support core engagement functions including:

- A public-facing events and programs calendar
- A room reservation system for public and staff-managed spaces
- Tools for scheduling one-on-one appointments with library staff
- A mobile application to enhance the digital experience

The Library currently utilizes the Polaris ILS for circulation, patron records, and core library operations, as well as BiblioCommons for discovery and patron engagement. Proposers should clearly describe how their solution integrates with the existing BiblioCommons platform, and how it will interoperate with Polaris ILS to ensure a seamless patron and staff experience.

Proposers should describe their approach to implementation, including project management, configuration, data migration (if applicable), integration with existing systems, and staff training. Ongoing support, system maintenance, and upgrade processes should also be detailed. The solution should be cloud-based, scalable, and compliant with applicable data security, privacy, and accessibility standards. The Library is particularly interested in solutions that minimize fragmentation by providing a unified platform or tightly integrated modules, reduce administrative burden on staff, and deliver a seamless and engaging experience for patrons across all digital touchpoints.

Events Calendar

The proposed events calendar must provide robust functionality for creating, managing, promoting, and evaluating library programs across multiple locations, audiences, and formats, including in-person, virtual, and hybrid events. The system should support public browsing and discovery through an intuitive interface with filtering, search, and personalization capabilities.

The Library will prioritize systems that allow flexible patron registration, including staff-created prerequisite questions, age-specific registration options for youth programming, waitlists, attendance tracking, no-show tracking, and automated notifications. Products that provide direct Zoom integration for online programming will also be prioritized due to increased security needs and ease of system-wide account management.

The Library is seeking a product with robust administrative back-end functionality, including hierarchical approval workflows, template creation, role-based staff permissions, and efficient tools for managing content across departments and locations. The system should also improve data accuracy and reduce staff process redundancies through integrated statistics tracking, customizable reporting fields, attendance reporting, and other functional data management tools. Optional additions would include integrated survey tools or other polling features.

The solution should allow for easy embedding within the Library's website and existing tools, such as the existing discovery layer, Bibliocommons, and our room reservation system.

Room Reservation

The room reservation component must enable patrons to view availability and reserve library meeting rooms and study spaces in real time, with configurable rules governing booking duration, eligibility, and usage policies. The system should provide administrative controls for staff approval workflows, conflict management, reporting, and enforcement of policies, while presenting a clear and accessible interface for patrons. Integration with patron authentication systems, including Polaris ILS, is expected to ensure that reservations are appropriately tied to user accounts and library policies. A room reservation system that is directly connected to the event management system would be an ideal solution and would eliminate current redundancies and the need for staff to learn two separate systems. The Library is also seeking a room reservation system that can facilitate online payments for room reservations to eliminate extra staff time managing payment separately.

Appointment Scheduling

The appointment scheduling functionality should allow patrons to book one-on-one sessions with library staff for services such as research assistance, technology help, digital literacy support, career assistance, and other consultation-based services. The Library is seeking a solution that can support both public event registration and one-on-one appointment scheduling within a single integrated platform or tightly connected suite of products, reducing the need for staff and patrons to navigate separate systems.

The system should support configurable service types, staff availability, appointment duration, location-based services, and virtual meeting options, with a preference for systems that offer Zoom integration. The solution should provide a clear and accessible patron-facing booking experience, including automated confirmations, reminders, cancellation options, and appointment details.

The system should also provide staff-facing tools for managing schedules, updating availability, viewing upcoming appointments, tracking completed appointments, recording relevant service information, and generating usage reports. Reporting should allow the Library to track appointment volume, service type, location, staff assignment, attendance, cancellations, and other relevant data points.

The Library will prioritize solutions that provide a consistent patron experience across event registration, room reservation, and appointment scheduling functions, with shared administrative tools, reporting capabilities, user account integration, and branding where possible.

Mobile Application

The mobile application should serve as a centralized platform that brings together the Library's digital services, including catalog access via BiblioCommons or an app connection to Polaris, event discovery and registration, room reservations, and appointment scheduling. The app should support secure patron authentication leveraging Polaris ILS credentials, and provide features such as digital library cards, push notifications, and personalized content. The Library seeks a modern, accessible, and high-performing mobile experience that is consistent with its web presence and enhances overall patron engagement. The Library will prioritize mobile apps that allow extensive customization.

Contract Term

Initial Term: One year beginning July 1, 2026 to June 30, 2027

Contract Extension: Four, one-year extensions will be available following the initial term by mutual agreement of both parties providing there are no changes or minimal changes to pricing/discounts. Pricing/discounts and shipping terms will remain the same under this option unless otherwise noted by vendor in RFP response for renewal option years.

The Library reserves the right to execute separate contracts for individual modules and/or award to multiple vendors.

Notice to Proposers

The successful Proposer must comply with all provisions of the Americans with Disabilities Act (ADA) and all rules and regulations promulgated thereunder. By submitting a proposal, the successful Proposer agrees to indemnify the Library from and against all claims, suits, damages, costs, losses, and expenses in any manner arising out of, or connected with, the failure of the Company, its subcontractors, agents, successors, assigns, officers, or employees to comply with the provisions of the ADA or the rules and regulations promulgated thereunder.

All proposals must be firm and not subject to increase, unless specified within the provisions of this Request for Proposals (RFP) and mutually agreed upon by the Library and the Proposer.

No special inducements will be considered that are not a part of the original proposal document.

Library Rights and Options

The Library, at its sole discretion, reserves the following rights:

- To supplement, amend, substitute, or otherwise modify this RFP at any time
- To cancel this RFP with or without the substitution of another RFP
- To take any action affecting this RFP, this RFP process, or the Services subject to this RFP that would be in the best interests of the Library
- To issue additional requests for information or clarification from Offerors or to allow corrections of errors or omissions
- To require one or more Service Providers to supplement, clarify, or provide additional information in order for the Library to evaluate the Responses submitted
- To negotiate an agreement with a Service Provider based on the information provided in response to this RFP.
- To award one or more contract(s).

Public Records

Any material submitted in response to this RFP will become a "public record" once the Proposer's document(s) is opened and the Proposer is determined to be a participant in the solicitation process and shall be subject to public disclosure consistent with Chapter 132, North Carolina Statutes. Proposers must claim any applicable exemptions to disclosure provided by law in their response to this RFP. Proposers must identify materials to be protected and must state the reasons why such exclusion from public disclosure is necessary and legal. The Library reserves the right to make all final determination(s) of the applicability of North Carolina General Statutes § 132-1.2, Confidential Information.

Trade Secrets/Confidentiality

Proposers must claim any material which qualifies as "trade secret" information under N.C.G.S. 66- 152(3) in their response to this RFP and must state the reasons why such exclusion from public disclosure is necessary and legal.

To properly designate material as trade secret under these circumstances, each Proposer must take the following precautions: (a) any trade secrets submitted by a Proposer should be submitted in a separate, sealed envelope marked "Trade Secret - Confidential and Proprietary Information - Do Not Disclose Except for the Purpose of Evaluating this Proposal," and (b) the same trade secret/confidentiality designation should be stamped on each page of the trade secret materials contained in the envelope.

Do not designate your entire proposal as a trade secret, and do not designate pricing information as a trade secret. Doing so may result in your proposal being disqualified.

In submitting a proposal, each Proposer agrees that the Library may reveal any trade secret materials contained in such response to all Library staff and Library officials involved in the selection process.

Familiarity with Laws and Ordinances

The submission of a proposal on the equipment and services requested herein shall be considered as a representation that the Proposer is familiar with all federal, state, and local laws, ordinances, rules, and regulations which affect those engaged or employed in the provision of such services, or equipment used in the provision of such services, or which in any way affects the conduct of the provision of such services; and no plea of misunderstanding will be considered on account of ignorance thereof. If the Proposer discovers any provisions in the RFP documents that are contrary to or inconsistent with any law, ordinance, or regulation, it shall be reported to the Library in writing without delay.

E-Verify Compliance

Per N.C.G.S. 143-133.3 E-verify compliance. Provider shall comply with the requirements of Article 2 of Chapter 64 of the North Carolina General Statutes (verification of work authorization). Further, if the Provider utilizes a subcontractor, the Provider shall require the subcontractor to comply with the requirements of Article 2 of Chapter 64 of the North Carolina General Statutes.

https://www.ncleg.gov/EnactedLegislation/Statutes/PDF/BySection/Chapter_143/GS_143-133.3.pdf

https://www.ncleg.net/EnactedLegislation/Statutes/HTML/ByArticle/Chapter_64/Article_2.html

Iran Divestment Act

Provider hereby certifies that it is not on the North Carolina State Treasurer's list of persons engaging in business activities in Iran, prepared pursuant to NCGS 147-86.58, nor will Provider utilize on this agreement any subcontractor on such list. This list, along with additional information about the Iran Divestment Act, is available on the Treasurer's Office site: <https://www.nctreasurer.gov/iran-divestment-act>

Divestment from Companies that Boycott Israel

Contractor hereby certifies that it is not on the North Carolina State Treasurer's list of companies engaged in a boycott of Israel in violation of NCGS 147-86.80 et. seq. and that it will not utilize on this agreement any subcontractor on said list."

Contract Required

The successful proposer will be required to enter into a written contract with the Library, setting forth the conditions specified in this RFP, as well as other standard terms and conditions. The successful vendor shall be solely liable for compliance with all specifications contained herein.

Proposal Duration

All proposals will remain in effect and shall be legally binding for at least one hundred twenty (120) days after the proposal submission due date.

Request for Proposal Process

Schedule

Date	Event
April 29, 2026	RFP Issue Date
5:00 PM EST May 15, 2026	Deadline for Submission of Written Questions. Service Providers are permitted to submit to the Library written questions, but only for purposes of clarifying this RFP. All submissions shall be submitted as outlined herein.
May 20, 2026	Response to Written Questions via Addendum
2:00 PM EST May 28, 2026	Responses are due on this date and time.
June 2026	Library review and firm selection (interviews if needed)
June 2026	Anticipated contract award

Proposer Questions and Inquiries

Proposer Questions and Inquiries relative to this RFP must be submitted electronically by 5:00 PM, May 15, 2026, to Michael Boger, Deputy Finance Director, at mboger@cmlibrary.org. The Library will provide written responses to all inquiries received by this date, and responses will be made available to all known recipients of this RFP and posted by May 20, 2026. Any oral responses made by any representative of the Library may not be relied upon. Any supplements or amendments to this RFP will be in writing and furnished to potential bidders.

Proposers are expressly forbidden from contacting any other Library employee or Charlotte Mecklenburg Library official regarding this Request for Proposals. Any such outside contact may result in disqualification from the request for proposal process.

Submission of Responses

Five (5) paper copies in a sealed envelope/package and one (1) electronic copy of the proposal by way of a USB drive, including all required forms (such as Proposal Authorization and Acknowledgement of Addenda forms), must be submitted to the attention of Michael Boger, Charlotte Mecklenburg Library, Library Administration Center, 510 Stitt Road, Charlotte, NC 28213 by 2:00pm EST on May 28, 2026. Emailed and faxed submissions will not be accepted. All risk of late arrival due to unanticipated delay – whether delivered by hand, US Postal Service, courier, or other delivery service is entirely on the submitting Proposer. It is the sole responsibility of the Proposer to have the proposal physically in the Library’s office by the specified time and date. The time of delivery will be marked on each proposal when received, and any proposal received after the proposal submission deadline will be rejected.

The Library reserves the right to reject any or all proposals. The Library reserves the right to reproduce proposals for internal use in the evaluation process.

The Library will not be obligated for the expenses of any provider arising out of preparation and/or submittal of responses to this RFP. Any and all proposals to this RFP are to be prepared at the cost and expense of the respondents, with the express understanding that there may be no claims whatsoever for the reimbursement of

any costs, damages, or expenses relating to this procurement from the Library or any other party for any reason (including the cancellation of this RFP).

Proposals must be made in the official name of the individual, firm, or corporation under which the business is conducted (showing official business address) and must be signed in ink by a person duly authorized to legally bind the business entity submitting the proposal.

All proposals should be complete and carefully worded and must convey all of the information requested by the Library. If errors or exceptions are found in the proposal, or if the proposal fails to conform to the requirements of the RFP, the Library will be the sole judge as to whether that variance is significant enough to reject the proposal. Proposals should be prepared simply and economically. All data, materials, and documentation shall be available in a clear, concise form.

Evaluation Criteria

All bids that are submitted in accordance with this RFP and which meet the requirements as outlined herein will be considered to be responsive bids. Notwithstanding anything to the contrary herein, any and all bids may be rejected, and the Library may negotiate with any or all bidders. Proposals will be evaluated using a best-value approach. Each proposal will be reviewed and scored by an evaluation committee using the criteria below. While cost is a significant factor, the Library will award the contract to the proposer whose overall solution best meets the needs of Charlotte Mecklenburg Library in terms of functionality, usability, service quality, and long-term value.

A short-list of firms may be invited to Stage 2 of the evaluation process, the Interview/Demonstration. Interview/demonstrations are an important aspect of the evaluation process that offers the Library an opportunity to see how the proposer's solution meets the critical components of the RFP. A committee will evaluate the responses and select the top proposal. The Library may elect to make a final selection without holding an interview/demonstration.

- **Experience and Qualifications – 25%**

This criterion will evaluate the proposer's demonstrated experience providing integrated library engagement and discovery technologies, including but not limited to events management systems, room reservation platforms, patron scheduling tools, and mobile applications. Evaluation will consider the proposer's history of successful implementations in public library environments, particularly with organizations of similar size and complexity to Charlotte Mecklenburg Library.

Special emphasis will be placed on the qualifications and stability of the implementation and support team assigned to the Library, including technical expertise, project management experience, and ongoing customer support capacity. The Library will also consider references, client retention, and demonstrated ability to deliver continuous improvement and long-term platform support.

- **Functional Capability and System Integration – 35%**

This criterion evaluates the overall functionality, usability, and reliability of the proposed solution(s), including how well each component supports library operations and patron engagement. Systems will be assessed on ease of use, configurability, accessibility compliance, workflow efficiency, and administrative control.

Particular attention will be given to the ability of the proposed tools to integrate with the Library's existing systems, including Polaris ILS, authentication services, website infrastructure, and any existing third-party platforms. Proposals should demonstrate seamless interoperability between modules such as events, room booking, librarian appointment scheduling, and related patron-facing services.

The solution should also demonstrate scalability, uptime reliability, and a clear roadmap for future enhancements.

- **Cost Effectiveness – 20%**

Cost will be evaluated on a per-module and total solution basis. Proposers must provide clear, itemized pricing for each module, including licensing, implementation, hosting (if applicable), maintenance, support, and any optional services.

Evaluation will consider total cost of ownership, pricing transparency, and flexibility in purchasing individual modules. Discounts for bundled services may be considered, but will not be weighted more heavily than the value of selecting best-fit individual components. Award may be made for individual components.

- **Implementation, Training, and Support Services – 10%**

This criterion evaluates the proposer's ability to successfully implement the proposed solution(s) and support long-term adoption. Proposals will be assessed on implementation methodology, project timelines, risk mitigation strategies, and change management approach.

The Library will also evaluate the quality and accessibility of training resources, including onsite, virtual, and self-paced options. Ongoing technical support, help desk responsiveness, escalation procedures, and customer service structure will be reviewed to ensure they meet the operational needs of a large public library system.

- **Proposal Quality and Responsiveness – 5%**

This criterion assesses the overall quality, clarity, and completeness of the proposal submission. Proposals should be well-organized, easy to follow, and responsive to all requirements outlined in the RFP. Failure to address required components or provide sufficient detail may negatively impact scoring.

- **Interview/Demonstration (if held) – 5%**

Award will be made at a later date pending evaluation of all proposals submitted and approval by the Library's Board of Trustees.

The Library reserves the right to award any individual module independently to one or more vendors. Each module must be fully functional and supported as a standalone solution, regardless of whether it is part of a broader vendor suite. The Library makes no guarantee that all modules will be awarded, or that any minimum amount of services will be purchased as a result of this RFP.

Rejection of the Proposal

The Library reserves the right to determine and evaluate the qualifications of the Operator's candidates and to reject any Final Proposals.

The Library retains the right to waive minor irregularities in the statement format.

Basis for rejection includes but is not limited to:

- Contains false or misleading statements.
- Not in the format described under Proposal Content.
- Unsigned proposal by authorized person
- Unsigned acknowledgement of addenda form
- Received after the due date.
- Restriction or limitation upon their use.

Proposal Format

Section A: Executive Summary

A concise overview of the proposal highlighting key points of the response. This section should summarize the proposed solution(s), including the modules being offered (e.g., events management, room reservation, librarian scheduling, mobile application if applicable), and the overall approach to meeting the needs of Charlotte Mecklenburg Library.

The summary should also highlight pricing structure at a high level, key differentiators, and any value-added services, efficiencies, or cost-saving measures. Proposers may also use this section to briefly describe their competitive strengths and alignment with public library service needs.

Section B: Summary of Company

Provide a narrative overview of the company, including history, mission, and core competencies. Include information on organizational size and structure, such as number of employees, geographic presence, and annual revenue (if applicable).

- **Support Team:** Provide detailed information on the proposed implementation and support team, including resumes or role summaries, relevant experience, and clearly defined responsibilities. Include years of experience supporting similar technology solutions in public library or comparable environments.
- **Customer Service:** Describe your approach to customer service and ongoing client support, including responsiveness standards, communication practices, escalation procedures, and collaborative engagement with library staff.

Section C: Agency Qualifications and Technical Capabilities

- **Experience with Similar Implementations:** Describe experience implementing comparable systems in public library environments, including scale, complexity, and outcomes.
- **Platform and Module Capabilities:** Provide a detailed description of all proposed modules and their capabilities, including but not limited to events management, room reservation systems, patron scheduling tools, and mobile applications (if applicable). Clearly indicate whether modules function independently or as part of an integrated suite.
- **Integration Capabilities:** Describe the ability to integrate with existing library systems, including Polaris ILS, authentication services, websites, APIs, and other third-party tools.
- **Technology Infrastructure:** Provide details on system architecture, hosting environment, uptime reliability, security standards, accessibility compliance (including WCAG standards), and data privacy protections.
- **Product Roadmap and Innovation:** Describe your approach to ongoing development, including feature enhancements, product updates, and responsiveness to client feedback and evolving library needs.

Section D: Professional References

Provide three references from current or recent clients (within the last three years), preferably public libraries or similarly complex public sector organizations. References should be comparable in size, scope, and service model to Charlotte Mecklenburg Library.

Section E: Cost of Services

Clearly provide itemized pricing for each proposed module, including licensing, implementation, configuration, hosting (if applicable), maintenance, support, and any optional or ancillary services.

Pricing must be structured to allow for evaluation and potential award on a per-module basis. Proposers should clearly identify any dependencies between modules, bundled pricing options, or tiered service levels.

Evaluation will focus on transparency, clarity, and flexibility in selecting individual modules or combinations of modules. Any discounts or bundled pricing should be clearly identified but will not limit the Library's ability to select individual components across one or more vendors.

Proposal Authorization and Signature

This proposal must be signed by a responsible official of the offering company and notarized. By signing below as an authorized representative, the Proposer agrees to be bound by the representations, terms and conditions contained in its proposal and agrees to enter into a contract based upon the terms, representations and conditions contained in the proposal with the Library if this proposal is approved and awarded by the Library.

Firm Name

Print name of signer

Date

Authorized Signature

Street Address

City, State and Zip Code

Telephone number

Email Address

Acknowledgement of Addenda

If issued, Proposer hereby acknowledges receipt of the Addenda issued. This form shall be signed by an authorized company representative and returned with the proposal response. Provide number of the Addendum you received, and the date received.

Addendum No. _____ Dated _____

Addendum No. _____ Dated _____

Company _____

Authorized Signature _____

Print Name _____

Email Address _____

Note: Please print clearly