

October 1, 2013

To whom it may concern

**Re: Request For Information (RFI) for Library Materials Cooperative Purchasing Agreement**

The BC Libraries Cooperative is requesting information from interested parties for the supply of Library Materials Purchasing. This RFI is intended to gather information that could assist the Cooperative in the development of a future procurement process. In the event that sufficient information is received, the Cooperative may, but is not obligated to, initiate a competitive bidding opportunity.

Interested parties are invited to respond to this RFI by submitting a response to the Cooperative. Responses should include ideas, information, and recommendations that could result in a clarification of the requirements, cost-saving opportunities, and the identification of potential problem areas with this initiative.

Respondents are requested to provide a concise and focused response to this RFI by completing the attached *BC Libraries Cooperative Request For Information (RFI) for Library Materials Cooperative Purchasing Agreement.*

Respondents are specifically requested not to submit price proposals (other than high-level cost estimates for budget purposes) or information about the qualifications or experience of their firm or individuals in their firm. This RFI will not be used to evaluate, rank, or select vendors, nor will it be used to pre-qualify or screen vendors for a subsequent competitive bidding process, if any.

If subsequent competitive bidding opportunities are issued, the Cooperative is under no obligation to advise any vendor responding to this RFI. Vendors are advised to monitor the BC Libraries Cooperative website [http://bc.libraries.coop](http://bc.libraries.coop/) for any such opportunities, which will be open to all vendors regardless of whether or not a response to this RFI has been submitted.

All responses to this RFI become the property of the Cooperative and will be held in confidence, subject to the provisions of the *BC Freedom of Information and Protection of Privacy Act*. Respondents to this RFI consent to the Cooperative incorporating any submitted ideas, concepts, approaches, or strategies into any planning, design, procurement, or contractual activities related to any aspect of the project without any obligation, liability, or consideration on the part of the Cooperative. The Cooperative will not be responsible for any costs incurred by any vendor in responding to this RFI.

…/2

RFI for Library Materials Cooperative Purchasing Agreement

Page 2

Responses should be sent via email in electronic format, Word or PDF files, to office@bc.libraries.coop before 5:00 p.m. Pacific Time on November 5, 2013, and should quote RFI Number: 2013-10-01.

Regards,



Ben Hyman

Executive Director

BC Libraries Cooperative

Attachment

**BC Libraries Cooperative**

**Request For Information (RFI) for Library Materials Cooperative Purchasing Agreement**

Sitka, a group of the BC Libraries Cooperative, is a consortium of libraries in British Columbia and Manitoba who all share a single integrated library system using the open source Evergreen software. The Sitka members are exploring opportunities to maximize their purchasing power by working with vendor organizations that negotiate favorable pricing for libraries, and by directly negotiating favorable discount agreements with vendors of goods and services of interest to them.

# Instructions to Vendors

**Please note the following important dates associated with this RFI:**

**Tuesday, October 1, 2013: RFI made available to vendors**

**Tuesday, October 15, 2013 @ 5:00 pm PDT: Deadline to receive questions and clarification.** Please send questions or clarifications to Laurie Davidson, Sitka, BC Libraries Cooperative, **ldavidson@sitka.bclibraries.ca**. Responses will be compiled and shared back to all participating vendors.

**Tuesday, November 5, 2013 @ 5:00 pm PST: Vendor responses to RFI due**

Final responses should be sent to **office@bc.libraries.coop** in electronic Word or PDF format with responses inline. Please include supplementary information in Appendices, if desired, and quote the RFI Number: 2013-10-01.

# Context

All Sitka libraries share an Evergreen ILS. As of July 2013, there are currently 70 Sitka libraries: 12 in Manitoba and 58 in British Columbia. There are a total of 115 branches in Sitka. There are 52 BC public libraries, one government, one K-12, and four post-secondary libraries. In Manitoba, there are nine public libraries, two government, and one special library. New libraries are joining on an on-going basis and four more libraries are slated to be migrated into Sitka over the next six months.

Sitka is a decentralized consortium with many local library practices, with the commonality of a shared integrated library system. We’re unique as many other library consortia have a more centralized technical services and cataloguing model. Within BC, the public libraries are broken into six federations. Currently, all of the ordering happens at the individual library level, though there is the possibility for federation - or Sitka-level cooperation.

The Sitka catalogue has approximately 1.3+ million bib records and 2.8+ million item records, with an average collection size of 41,000 items. This puts our catalogue at about the same size as the Vancouver Public Library. We have two library systems with over 250,000 items each. In 2012, 56,000 bibliographic records were added and 220,000+ items were added (these numbers exclude libraries that migrated in 2012). For the 61 public libraries of BC and Manitoba, the combined acquisition budget for print and non-print materials is approximately $2.8 million with a total service population of 650,000. An approximate breakdown of the Sitka public libraries’ service populations is as follows: 50,000+ = two libraries; 20,000-50,000 = four libraries; 10,000-20,000 = 11 libraries; 5,000-10,000 =15 libraries; under 5,000 = 29 libraries.

A recent Cataloguing survey (Jan 2013) indicated that our Sitka member libraries were interested in ways to reduce staff time spent on cataloguing. Some of the major roadblocks identified in the process of order to shelf are: finding staff time to process materials, not being able to find a good MARC record, and items not arriving quickly enough from the vendor. With these challenges in mind, we are looking for responses from vendors to help us offer our libraries better access to ordering and processing services.

For a complete list of the Sitka libraries, please see here:

<http://bc.libraries.coop/products-services/sitka/implementations/current-sitka-libraries/>

**We are particularly looking for superior service and cost-savings in the following areas:**

1) Materials Purchasing

2) MARC Record Provision

3) Processing and Shelf-Ready Services

4) Automatic Release Plans and other Selection Services

# Questions to Vendors

**Instructions: Please provide responses inline to all of the following questions in electronic Word format. Please include supplementary information in Appendices, if desired.**

**I) Materials Purchasing**

I.1) Given a combined approximate annual print and non-print material purchasing budget of approximately $2.8 million, please answer the following questions:

1. Is there an overall combined minimum budget from all Sitka libraries in order to be able to take advantage of a purchasing agreement with the vendor?
2. Does the vendor offer deals at the material type level such as trade, paperback, large print, dvds, etc.?
3. What percentage of discount would you be able to offer Sitka libraries, if a Sitka purchasing contract were established. Please also note what factors contribute to this discount. Is there a minimum # of participating libraries to secure this discount?
4. Is there a minimum order required from each library in order to take advantage of the pricing discount?
5. What areas of collection building do you provide (eg, fiction, non-fiction, juvenile, dvd, large print, etc.)? Please mark in the following table and add additional categories as appropriate.

|  |  |  |  |
| --- | --- | --- | --- |
| **Area** | **Vendor Offers (y/n)** | **Price Discount** | **Comments** |
| Best-Sellers |  |  |  |
| Trade |  |  |  |
| Mass Paperback |  |  |  |
| Hard-cover |  |  |  |
| DVDs |  |  |  |
| CDs |  |  |  |
| Audiobooks |  |  |  |
| Multilingual (specify language and format) |  |  |  |
| Ebooks |  |  |  |
| Board Books |  |  |  |
| Picture Books |  |  |  |
| Large Print |  |  |  |
| Additional: |  |  |  |

f) Please comment on your Canadian content coverage.

I.2) Ordering and Delivery

1. What are the shipping costs and what are the requirements to get price breaks on shipping (large order, $ amount, etc.)? Is there a minimum order requirement to get free shipping?
2. How quickly must the payment be made after invoice date?
3. What is the turnaround time between point of order and arrival at library? Many of our libraries are in rural BC and Manitoba, so shipping turnaround time is of concern.
4. What is the return policy?
5. What is your average rate of order fulfillment?
6. Do you have a web-based interface for ordering?

**II) MARC Record Provision**

II.1) On-order Records

1. Does the vendor supply brief MARC records for on-order materials?
2. How are these records distributed (eg. created from an online ordering system, through an ftp site, email, etc.)?
3. Can the brief MARC records contain item level information including (but not limited to) attributes such as library code, temporary barcode, price, status, shelving location, and fund? In a consortial environment such as Sitka, are the fields such as fund and shelving location configurable library by library or must they be consistent on the system level? Is there an extra cost associated with this customization?
4. Is the vendor able to send a single consolidated brief MARC file with individual libraries holdings attached to each record, or is it separate MARC files per library?
5. Do the brief MARC records have a vendor unique matchpoint that can be used for matching when the full MARC record becomes available?
6. We realize that the standardization of copy information in the MARC records for each library makes it easier for the vendor. What standardization or efficiencies are required in order to get the best price in this area?

II.2) Full MARC Records

1. Does the vendor provide full MARC records for materials purchased? If yes, how are the MARC records created – eg. onsite cataloguers, derived cataloguing (if so, from what sources)?
2. Does the vendor provide different quality level of the full MARC record, and if so, how does this affect pricing?
3. How are the full MARC records made available (eg. downloaded from website, through an ftp site, send via email, etc.)?
4. Is it possible for the full MARC records to contain item level information including permanent barcode (if library gives range or barcode processing has been purchased), final price, status, shelving location, and other fields. In a consortial environment such as Sitka, are the fields such as fund and shelving location configurable library by library or must they be consistent on the system level. Is there an extra cost associated with this customization?
5. Is the vendor able to send a single consolidated full MARC file with individual libraries holdings attached to each record, or is it separate full MARC files per library?
6. Does the full MARC record have a vendor unique match point that can be used for matching against the brief MARC record that was loaded during the ordering period?
7. We realize that the standardization of copy information in the MARC records for each library makes it easier for the vendor. What standardization or efficiencies are required in order to get the best price in this area?
8. Does the vendor provide MARC records in RDA, AACR2, or both? Are all new records catalogued using RDA?

II.3) Other

1. Does the vendor system support electronic (EDIFACT) purchase orders?
2. Does the vendor system support electronic (EDIFACT) invoices?
3. Does the vendor provide MARC authority records for the MARC records given? If yes, what is the cost? Are the authority records available in RDA, AACR2, or both?
4. Overall we are looking for quality of MARC record provision and also a willingness to work with the Sitka team to make sure loading of records into the Evergreen system works efficiently. Please indicate your position in this regard.

**III) Processing and Shelf-Ready Services**

III.1) We are looking for competitive pricing on processing services so libraries can optionally save time on their own processing.What is the percentage of discount would you be able to offer Sitka libraries, if a Sitka processing contract were established?

1. In the following table, please indicate which processing and shelf-ready services you provide as well as optimal pricing.

|  |  |  |  |
| --- | --- | --- | --- |
| **Service** | **Vendor Offers (y/n)** | **Price** | **Comments** |
| Spine Label |  |  |  |
| Lamination |  |  |  |
| MARC Record ( Brief) |  |  |  |
| MARC Record (Full) |  |  |  |
| MARC Record and Barcode (other item level information?) |  |  |  |
| Barcode only |  |  |  |
| Full Processing (please detail what this includes) |  |  |  |
| Theft Detection/security strips (state what systems you work with, eg: 3M) |  |  |  |
| RFID (state what systems you work with) |  |  |  |
| Genre labels |  |  |  |
| Property Stamping |  |  |  |
| Book covers |  |  |  |
| Dust-jackets |  |  |  |
| AV-packaging |  |  |  |
| Additional: |  |  |  |

b) Processing will need to be balanced between library local practices and consortial level standards. Please specify what requirements we would need to standardize in order to guarantee best prices.

**IV) Automatic Release Plans and other Selection Services**

IV.1) Does the vendor support ARP (Automatic Release Plans)? If so, in what areas? Please describe this service.

IV. 2) Are there other selection services that you could offer a consortial environment such as Sitka’s, that would be beneficial to our libraries?

**V) Additional Information**

V.1) Please provide us with information about your company including name, address, contact, webpage, annual sales, # of employees, number of years on market, location, etc.

V.2) Please provide metrics on the number of MARC records and items processing that you do per year.

V.3) To help us understand the broader context that you work in, please provide as many detailed workflow scenarios and pricing models for other consortia with which you currently work that utilize any or all of the above services in a consortial framework: Materials Purchasing, MARC Record Provision, Processing and Shelf-Ready Services, Automatic Release Plans, and other Selection Services.

V.4) What is the expected length of a negotiated contract (1 yr, 3 yr, etc.)? Is there additional discounting for longer term commitments?