

SNO-ISLE LIBRARIES



REQUEST FOR PROPOSAL

LIBRARY MATERIALS | NO. 2024.09.30

SNO-ISLE LIBRARIES

7312 35TH AVE NE | MARYSVILLE, WA 98271-7417

TABLE OF CONTENTS

1. OVERVIEW 2

2. BACKGROUND 2

3. TIMELINE 3

4. REQUIREMENTS & QUESTIONNAIRE..... 4

1 | Requirements | Scoring Weight: 30%.....4

1.1 | Website Functionality 4

1.2 | Collection Development 4

1.3 | Cataloging & Acquisitions 5

1.4 | Shipping & Delivery 6

1.5 | Returns 6

1.6 | Customer Service..... 6

2 | Questionnaire | Scoring Weight: 45%7

2.1| Cost of Materials 7

2.2 | Availability of Materials 7

2.3 | Website Functionality 7

2.4 | Collection Development 8

2.5 | Cataloging & Acquisitions 8

2.6 | Processing 9

2.7 | Shipping & Delivery 9

2.8 | Company Information 10

5. QUESTIONS REGARDING RFP & ADDITIONAL INFORMATION 10

6. PROPOSAL 10

7. EVALUATION PROCESS 13

8. TERMS AND CONDITIONS 15

* ATTACHMENT A – CERTIFICATIONS AND ASSURANCES MAY BE FOUND ON PAGE 16 OF THIS RFP DOCUMENT.

1. OVERVIEW

Sno-Isle Libraries (the Library) is requesting proposals from vendors that supply physical materials to Public Libraries, for the period January 1, 2025 – December 31, 2029. It is the Library's intent to use one (1) primary supplier of book materials and associated services. The purpose of this Request for Proposal (RFP) is to identify suppliers that will offer the Library the best overall value and service.

The Proposer must be willing to commit to the level of service and discounts quoted through December 2029, regardless of the volume of business. Important considerations to the Library are the cost of materials, availability of materials, website functionality, collection development tools, ordering efficiency, delivery requirements, and level of customer service, including handling of returns. The opportunity for high-volume business from the Library is possible if the cost and service aspects of the successful Proposer meet and/or exceed our expectations. The Library seeks Proposers that are willing to support the Library's Purpose and Vision, and are willing to work with the Library to meet its standards for workflow efficiency, processing, and cataloging.

The Library has the option to renew this proposal with the successful Proposer for two years up to two (2) times through December 2033, provided that the Proposer meets all performance expectations as stated in this document and subject to mutual agreement.

Requirements for invoices, shipping, etc., are included in the Requirements section of this RFP. A Proposer may not be disqualified solely on the basis of these preferences alone; however, a willingness to follow the preferred methods will be looked upon favorably. Proposers may submit Proposals for any or all of the material formats specified in the RFP.

2. BACKGROUND

[Sno-Isle Libraries](#) is a two-county public library district serving more than 800,000 people in Snohomish and Island counties through 23 community libraries, mobile and online library

services. The organization is headquartered at its Service Center in Marysville, Washington. The Library’s budget is expended on a calendar year basis. The Library anticipates allocating approximately \$2.37 million annually for its book budget for 2025 and again in 2026.

The Library's Collection Services Department centrally selects and places orders for all Library materials.

Currently, the Library uses the Polaris ILS and orders are transmitted electronically (EDI) on a regular basis. In most cases, pre-order verification is done to ensure that the title is available.

3. TIMELINE

The projected timeline for this RFP process is provided below. The Library may, at its sole discretion, modify the schedule as necessary to allow for thorough and complete analysis of responses. Any changes to the schedule will be communicated via written notification.

<u>Activity</u>	<u>Target Completion Date</u>
Issuance of RFP/Inquiry Period Begins	September 30, 2024
Inquiry Period Ends	October 16, 2024 by 2:00 pm (PDT)
Final Response to Proposer Questions	October 23, 2024 by 5:00 pm (PDT)
Proposal Due Date	October 30, 2024 by 12:00 pm NOON (PDT)
Selection of Successful Proposer	by December 6, 2024
Initial Contract Period	January 1, 2025 to December 31, 2029

4. REQUIREMENTS & QUESTIONNAIRE

1 | Requirements | Scoring Weight: 30%

For each requirement, the proposer will specify whether each service is available by checking either “yes” or “no”.

1.1 | Website Functionality

1. Sno-Isle Libraries requires an administrative login and fifty (50) additional logins to the Proposer’s online database, with the ability to create lists. Can you provide this?
 Yes No
2. Does the online selection and ordering software provide real-time and accurate information on titles currently in stock?
 Yes No

1.2 | Collection Development

1. Can users create and manage standing order plans online?
 Yes No
2. For orders placed through the Proposer’s online ordering system, is there a cumulative history of titles that can be searched by title, author, ISBN or other product number?
 Yes No
3. Is there a feature that allows the contents of a list/cart to be compared to the order history?
 Yes No
4. Does the Proposer’s online database contain a link to the Library’s catalog to check holdings using ISBN, Universal Product Code (UPC), or Online Computer Library Center (OCLC) Control number?
 Yes No

1.3 | Cataloging & Acquisitions

1. Does the Proposer provide downloadable brief MARC records to be available at the time of order?

Yes No

a. Do the vendor brief MARC records contain Library of Congress authorized subject headings (i.e. MARC tag 650 or other 6XX tags)?

Yes No

b. Is grid information supplied within the vendor brief MARC records at the time of download?

Yes No

2. Does the Proposer provide “shelf ready” MARC records that provide barcode and item record linking capability?

Yes No

a. If yes, are these records provided at the time of order shipment?

Yes No

b. Is there a fee for “shelf ready” MARC records?

Yes No

3. Is the Proposer able to receive and correctly interpret orders and provide invoices in the EDIFACT format?

Yes No

4. The Proposer will provide the Library with:

c. Backorder status report every 30 days.

Yes No

d. Cancelled titles report every 30 days.

Yes No

e. Monthly statement of outstanding invoices and credits.

Yes No

f. Reference to the original invoice number on any credit vouchers.

Yes No

g. Monthly report of the number of items ordered and number of items shipped.

Yes No

1.4 | Shipping & Delivery

1. The Proposer will ensure that boxes weigh no more than 50 pounds each.

Yes No

2. Box label must include Sno-Isle's account number, ATS number, and carton number.

Yes No

3. For multi-carton shipments, the box containing the invoice will be clearly specified.

Yes No

4. Ability to ship all containers simultaneously per order.

Yes No

1.5 | Returns

1. The Library expects materials received after 120 days to be eligible for return.

Yes No

2. The library expects to return materials without prior approval. This may include titles shipped incorrectly by the Proposer, and sometimes items ordered incorrectly by the Library (*the Library will keep returns due to its errors to a minimum*).

Yes No

3. The Library will return any imperfect copies for replacement even if the Library's identification marks have been placed on the material before the imperfection was discovered.

Yes No

4. The Proposer will provide the Library with a list of pre-approved return authorization numbers for efficiency of returns.

Yes No

1.6 | Customer Service

1. The Proposer will provide a dedicated customer service representative to handle phone orders, special orders, problems, and questions.

Yes No

- The Library expects a response from the customer service representative within one business day when a voicemail message is left or an email is sent.

Yes No

2 | Questionnaire | Scoring Weight: 45%

2.1 | Cost of Materials

- Provide a list of material types and eligible discounts.
- What is the percentage of titles offered at full discount? Note if and what exceptions there are to the discounts or service charges.

2.2 | Availability of Materials

- What is your current fulfillment rate?
- Does the Proposer supply book titles in languages other than English?

Yes No

- If yes, in what languages and formats?
- What quantity of world language titles do you currently have in your warehouse?
- Provide samples of any catalogs for materials in languages other than English.

2.3 | Website Functionality

- Provide a link to your online ordering platform. Provide trial access and logins if Sno-Isle Libraries does not currently have accounts.
- How is technical support provided (e.g. email, phone, live chat, etc.)?
- What are the hours of operation for live support?
- Does the online selection and ordering software provide access to open and closed invoices, credit memos, and current order status in a downloadable format?
- Describe any additional reports that are available via the ordering platform and whether they are customizable. Please provide samples of each.
 - Include information about report frequency and how they are produced.
 - What information is included in each report?

6. What is the Proposer’s commitment to ongoing enhancement and development of online selection and ordering services?
 - a. Are there any upcoming enhancements? If so, please describe.

2.4 | Collection Development

1. Describe the available collection development/selection services and tools and include current costs. Please include a sample cart/list as well as documentation on setting up profiles.
2. What collection analysis tools are available?
 - a. What are the costs, if any, of these tools?
 - b. Provide access to a trial account for Library staff.

2.5 | Cataloging & Acquisitions

1. Can the list price of the item be specified in a designated MARC tag subfield in each brief/vendor bibliographic record?
 Yes No
 - a. Is this service included as part of the contract or are there fees associated?
 - b. If fees are associated, are the fees one-time for setup or an annual charge?
2. Which character set/encoding scheme(s) does the Proposer provide for MARC records (i.e. MARC-8, Unicode)? Note, this is especially important for non-English languages that feature various diacritics.
3. Describe other cataloging and MARC record services and any associated fees, if not previously listed or described.
 - a. If fees are associated, are the fees one-time for setup, per record, or an annual charge?
4. For “shelf ready” or “barcode-linked” MARC records, describe the process for delivery or the Library’s retrieval of these records (i.e. email or FTP delivery).
5. Describe the ability to export the contents of a cart/list as a file of MARC records using a customized MARC profile established by the Library, which can be then loaded into the Library’s acquisition system.
 - a. Does the ordering platform allow the Library to create more than one customized MARC profile for use with differing formats (i.e. board books vs. paperbacks)?
6. Describe the electronic (EDIFACT) ordering and invoicing capabilities.

7. What is the Proposer's average turn-around time from the receipt of an order to the shipment of materials?
8. Provide a timeline for processed and unprocessed materials.
9. Provide any order restrictions that the Proposer has in place.
10. Describe the process for reporting and resolving technical issues (MARC records, EDI, etc.).
11. Provide your average turn-around time for programming requests, such as updating or implementing new processing specifications or adding a new collection requiring customized MARC record information.

2.6 | Processing

1. What are the costs to apply book jackets? Jackets will be polyester; end papers may be lightly glued or taped. Provide cost for each combination.
2. Provide details and cost information for other available processing services or packages, and any restrictions that apply.
3. Describe the process for submitting and maintaining processing specifications.
 - a. Will the Library have online access to processing specifications? Please describe.
4. Describe the process for reporting and resolving processing errors.

2.7 | Shipping & Delivery

1. Provide the location of the primary warehouse and secondary warehouse, if applicable.
2. Provide a list of preferred freight carriers and denote the designated Sno-Isle Libraries carrier, if known.
3. Provide the expected transit time for deliveries from time of shipping to arrival at 7312 35th Ave NE, Marysville, WA 98271, for both primary and secondary warehouses.
 - a. Does the Library have input in desired delivery day(s)/time(s)? Please describe.
4. Provide the minimum number of items or boxes required to trigger daily shipment of materials from the primary and secondary warehouses.
5. Describe your requirements to ship on pallets.
6. Describe the process for reporting and resolving shipping errors.
7. Describe your policy and process regarding materials returns.

2.8 | Company Information

1. Company name, business address and phone number.
2. Number of years Proposer has been in business.
3. Name of Parent company, if any.
4. Name of Company's President / CEO.
5. Name of Company's Director of Operations.
6. Name of Company's Director of Sales.
7. Name of Company's Director of Customer Service.
8. Name of designated Customer Service Representative (and contact information).
9. Three (3) references including a contact person for each reference.
 - a. The Library requests these references be major urban libraries.

5. QUESTIONS REGARDING RFP & ADDITIONAL INFORMATION

All questions or requests for clarifications should be submitted no later than 2:00 p.m. on Wednesday, October 16, 2024, to vendorsubmissions@sno-isle.org.

Responses to questions will be posted on our website as an addendum to this RFP and will be sent to the email address of the question submitter. Responses will be provided by 5:00 p.m. on Wednesday, October 23, 2024.

Times referenced herein are Marysville, Washington local time (PDT).

6. PROPOSAL

1. Proposal Contents

Sno-Isle Libraries is looking for succinct answers with relevant information. There will also be one "Certifications and Assurances" page you will sign and include as part of your Proposal.

- a. **Cover Letter (on company letterhead)**

Please provide a summary of the submitted proposal and a brief statement of the Proposer’s qualifications to meet the needs as described in this RFP including the following: 1) the identification of the Proposer, including name, address, email address, and telephone number; 2) the signature of the person authorized to bind the Proposer to the terms of this proposal; and 3) a statement that the proposal will be valid for 180 days.

b. General Company Profile and Experience

Briefly provide general information about the Company’s experience, capabilities, and length of time the firm has been in the business of performing work of a similar nature.

c. Format

Please respond to each requirement & question in Section 4. The Vendor’s response to each of these requirements & questions should follow the numbering in that section. Failure to comply with the instructions contained in this section may result in Vendor’s Proposal being deemed non-responsive and disqualified. The requirements & questions included are grouped by subject matter but are not listed by importance. Vendors are encouraged to read all requirements & questions prior to preparing a proposal.

d. Signed Certifications and Assurances

Sign and submit the *Certifications and Assurances (Attachment A)* as part of your Proposal.

2. Submitting a Proposal

Proposals may be submitted via email, mail, courier, or in person. Proposals should be in writing and include links or attachments to materials which support, validate, or demonstrate the qualifications of the submitter. The format may be a Word or PDF document.

The deadline for submission/receipt is Wednesday, October 30, 2024 by 12:00pm noon, PDT.

Submit Proposal to:

Karen Kramer, Procurement Specialist

vendorsubmissions@sno-isle.org

Sno-Isle Libraries

7312 35th Avenue NE

Marysville, WA 98271

Sno-Isle Libraries shall not be responsible for any costs incurred by the vendor in preparing, submitting, or presenting its response to the RFP.

All proposals received after the designated time stated will not be considered.

3. Revision/Rejection of Proposals

Sno-Isle Libraries reserves the right to “revise” or “amend” the RFP prior to the proposal due date by “written addenda”.

4. Proprietary Information/Public Disclosure

All proposals received shall become the property of Sno-Isle Libraries and remain confidential until a contract, if any, resulting from this request is signed by the Executive Director of Sno-Isle Libraries. After a contract is signed, all proposals received shall be deemed public records as defined in Chapter 42.56 of the Revised Code of Washington (RCW). Any information contained in the proposal that is proprietary must be clearly marked or designated as “confidential” in order to be excluded from public records request responses. Only information designated under current state law statutes as appropriate for exclusion from public records exposure may be marked and treated as confidential.

Sno-Isle Libraries reserves the right to request clarification of information submitted, and to request additional information from any Proposer. Sno-Isle Libraries reserves the right to reject any proposal for any reason including, but not limited to the following: (1) any proposal which is incomplete, obscure, irregular, or lacking necessary detail and specificity; (2) any proposal which has any qualification, addition, limitation, or provision attached; (3) any Proposer who (in the sole judgement of Sno-Isle Libraries) lacks the qualifications or responsibility necessary to perform the work; (4) any proposal for which a Proposer fails or neglects to complete and submit any qualifications information, and (5) any proposal which is received after the deadline date and time.

7. EVALUATION PROCESS

All responsive Proposals will be evaluated by a team of at least three SIL staff members and shall be ranked and rated according to the criteria stated below. The Library may select up to two (2) of the highest ranked Proposers with which to hold in-person presentations on services offered and website functionality. Proposers selected will be given an outline of what to include in their presentations. The evaluation team may permit revisions of proposals so long as all Proposers who are selected for additional discussions are given equal opportunity to revise their proposals.

The Library will evaluate the proposals and select a Proposer based on the:

1. Proposer's ability to meet our service requirements as outlined herein;
2. Quality and completeness of information provided via the questionnaire;
3. Quality and completeness of the proposal overall; and
4. Past experience with the Library (if any) and references.

Scores will be weighted as follows:

(30%) Requirements:

- Website Functionality
- Collection Development Services
- Cataloging & Acquisitions Services
- Shipping & Delivery
- Returns
- Customer Service

(45%) Questionnaire:

- Cost of Materials
- Availability of Materials
- Website Functionality
- Collection Development Services
- Cataloging & Acquisitions Services
- Processing Services
- Shipping & Delivery
- Company Information

(20%) Past performance of the Proposer as reflected by evaluation of previous Sno-Isle Libraries experience with the Proposer and discussion with Proposer references. Performance factors include quality of work, quality and responsiveness of customer service, and reliability of service and discounts.

(5%) Quality of the proposal; specifically, ability to meet requirements and adequacy of information provided.

8. TERMS AND CONDITIONS

The successful Proposer will be required to sign a contract with Sno-Isle Libraries. Sno-Isle Libraries will not sign any company's service agreement, contract, or any other form of agreement. Sno-Isle Libraries reserves the right to extract certain language from a company's agreement and incorporate it into a Sno-Isle Libraries contract if mutually agreeable to both parties.

The Proposer, by submitting a response to this RFP, waives all right to protest or seek any legal remedies whatsoever regarding any aspect of this RFP.

Sno-Isle Libraries reserves the right to negotiate with the selected Proposer the exact terms and conditions of the contract agreement.

Sno-Isle Libraries is under no obligation to award this project to the Proposer offering the overall lowest fee or contract terms. Sno-Isle Libraries reserves the right to disqualify vendors based on overall fee and contract terms. Evaluation criteria, included in this document, shall be used in evaluating Proposals.

Thank you for considering this RFP and for the efforts you may undertake to submit a proposal.

ATTACHMENT A**CERTIFICATIONS AND ASSURANCES**

I/we make the following certifications and assurances as a required element of the proposal to which it is attached, understanding that the truthfulness of the facts affirmed here and the continuing compliance with these requirements are conditions precedent to the award or continuation of the related contract:

1. I/we declare that all answers and statements made in the proposal are true and correct.
2. The prices and/or cost data have been determined independently, without consultation, communication, or agreement with others for the purpose of restricting competition. However, I/we may freely join with other persons or organizations for the purpose of presenting a single proposal.
3. The attached proposal is a firm offer for a period of 180 days following receipt, and it may be accepted by Sno-Isle Libraries without further negotiation (except where obviously required by lack of certainty in key terms) at any time within the 60-day period.
4. In preparing this proposal, I/we have not been assisted by any current or former employee of Sno-Isle Libraries whose duties relate (or did relate) to this proposal or prospective contract, and who was assisting in other than his or her official, public capacity. If there are exceptions to these assurances, I/we have described them in full detail on a separate page attached to this document.
5. I/we understand that Sno-Isle Libraries will not reimburse me/us for any costs incurred in the preparation of this proposal. All proposals become the property of Sno-Isle Libraries, and I/we claim no proprietary right to the ideas, writings, items, or samples, unless so stated in this proposal.
6. Unless otherwise required by law, the prices and/or cost data which have been submitted have not been knowingly disclosed by the Proposer and will not knowingly be disclosed by him/her prior to opening, directly or indirectly, to any other Proposer or to any competitor.
7. I/we agree that submission of the attached proposal constitutes acceptance of the solicitation contents and general terms and conditions. If there are any exceptions to these terms, I/we have described those exceptions in detail on a page attached to this document.
8. No attempt has been made or will be made by the Proposer to induce any other person or firm to submit or not to submit a proposal for the purpose of restricting competition.

9. I/we grant Sno-Isle Libraries the right to contact references and other customers, who may have pertinent information regarding the ability of the Contractor and the lead staff person to perform the services contemplated by this Request.

On behalf of the Contractor submitting this proposal, my name below attests to the accuracy of the above statement.

Signature of Proposer / Date