

Bucks County Free Library Request for Proposal

Library Materials and Related Value-Added Services

Date issued: June 2, 2023

Response due: June 30, 2023 by 2 pm

Bucks County Free Library invites sealed bids for the purchase of library materials and related processing and cataloging services for the period tentatively to commence March 1, 2024 and ending December 31, 2027 until:

2pm

Friday

June 30, 2023

Awards will be made to selected Vendors on or around July 31, 2023.

Responses may be delivered in person or mailed addressed to:

Bucks County Free Library CFO, John J. Doran III

Bucks County Free Library

150 South Pine Street Doylestown, PA 18901

Bucks County Free Library does not accept e-mailed or faxed bids.

Each bid must be enclosed in a clearly marked sealed envelope, attached to seven (7) copies of the required information. Bids are opened publicly in the 2nd floor Conference Room of the Doylestown Library at 2:15 pm the day they are due. Bids received after the above cited time will be considered a late bid and are not acceptable unless waived by the BCFL Administration.

General questions should be directed to Holly Ambrose at: ambroseh@buckslib.org. However, no oral interpretations shall be made to any respondent as to the meaning of any of the bid documents. Every request for an interpretation shall be made in writing and mailed or emailed to the address listed above. Such questions must be received at least three (3) calendar days before the established date for receipt of bids. These written requests will be answered in the form of an addendum and issued to all providers.

BCFL reserves the right to reject any or all bids or parts thereof, as deemed to be in the best interest of BCFL.

1. Purpose and Background

Bucks County Free Library (BCFL) is seeking proposals from Vendors for the purpose of obtaining information and firm bids for Vendors of library materials and related value-added services. BCFL seeks to establish a contract with one or more Vendors for a wide range of materials for adult, teen and juvenile audiences and Vendor services.

The budget for physical library materials for calendar year 2024 is approximately \$1,500,000 from all funding sources, which includes independent libraries. BCFL may choose to divide this budget among multiple Vendors and therefore cannot guarantee the actual amounts which will be purchased from any one Vendor. BCFL in its sole discretion will decide which selected Vendor is most suitable to provide required materials and services for each order.

About Bucks County Free Library

Bucks County Free Library is a seven-branch county library system with locations in Bensalem, Doylestown, Langhorne, Levittown, Perkasie, Quakertown, and Lower Makefield.

As a designated Pennsylvania public library district and system, the Bucks County Free Library collaborates on county wide projects, shares a public catalog, and provides collection development, materials processing, cataloging, and delivery services to 11 additional independent libraries in Bucks County. These libraries are independently governed and managed by their local boards and directors.

2. Scope of Services

BCFL is seeking a wide range of Vendor services for cost effective and timely provision of library materials for adult, teen and juvenile audiences as well as selection tools, physical processing, cataloging and other value added services.

Library materials include but are not limited to books, audiobooks on CD, DVDs, and Blu-ray discs.

Value added services include but are not limited to: automatic order plans, web based bibliographic resources, selection lists and other selection tools, electronic transmission of orders using the EDI standard, MARC catalog records, linked data services and shelf-ready item services including adaptive and copy cataloging and physical processing of materials.

3. Proposal Requirements

Vendors interested in providing the services described above are requested to submit the following information. Responses to each item should appear in the same order as

in this RFP and should designate by heading and paragraph the item to which the response applies.

3.1. Vendor Information & Executive Summary

Please provide the following information:

- Vendor's full company or corporate name
- Vendor's office location responsible for performance under a contract with BCFL.
- Provide the URL for the Vendor's website.

Each proposal should be accompanied by an executive summary not exceeding two pages which summarizes key points of the proposal and which is signed by an officer of the Vendor who is responsible for committing the Vendor's resources.

3.2. Ordering, Delivery, Invoicing and Customer Service

Please note any fees that would be charged by the Vendor for any of the services described below. If a service that is described is *not* one that can be provided, please mark as "NA" (not applicable).

NOTE: Questions related to Vendor "value added services" (e.g. automatic order plans, selection tools and lists, cataloging, physical processing services, etc.) are listed in *Section 3.3* and questions related to discounts and terms extended by the Vendor are contained in *Section 3.4*.

3.2.1. Ordering Methods

Describe the types of orders accepted (e.g. mail, phone, electronic, etc.). Also describe how accounts for different types of orders (e.g. adult, juvenile, teen, rush, special processing services, etc.) are profiled and set up. Indicate how rush orders are handled. Describe the software and equipment required for electronic ordering and whether the Vendor can receive electronic orders generated from BCFL's ILS vendor OCLC Wise in the EDI format. Indicate if orders can be transmitted electronically from lists produced on a web-based bibliographic database and whether the Vendor website includes stock information.

If the Vendor has several warehouses, please indicate whether the library must select a warehouse when an order is placed and any related requirements or changes in the order process. Please describe how orders are filled if the Vendor's primary warehouse does not have enough stock to fill an order.

BCFL currently uses the 949 tag in a brief MARC record downloaded from the Vendor website to transmit order information into OCLC Wise. The order is then transmitted to the Vendor from OCLC Wise via EDI. Describe the Vendor's ability to work with this current workflow.

3.2.2. Delivery of Materials

3.2.2.1. Fill Rates

Describe the average fill rates by format using percent (%) figures for materials

3.2.2.2. Turnaround Time

Describe the average turnaround time (including physical processing and cataloging of materials) for:

- Rush orders
- In-stock high demand new release titles
- In-stock backlist titles
- No stock or insufficient stock items

3.2.2.3. Delivery of Materials before Street Date

Describe the Vendor's ability to deliver fully processed and cataloged materials ahead of street date.

3.2.2.4. Packing and Marking Shipments

Describe how shipments are packaged and labeled and what types of materials are used for the boxes and packing. Include information about the numbering of boxes within a shipment (1 of 6, 2 of 6, for example) and where the numbering is located on the boxes. Indicate how boxes with packing slips or master packing slips are marked.

3.2.2.5. Packing Slip

Describe the format of packing slips provided and in what order the titles are listed. Indicate whether packing slips are routinely included with all shipments and whether boxes containing packing slips are clearly labeled as such. Enclose a sample of the packing slip.

For shipments comprised of multiple boxes, BCFL prefers to receive a packing list or equivalent with each carton listing the items in that carton along with one master packing list detailing all of the items in the shipment. Describe the Vendor's ability to meet this request

3.2.2.6. Method of Shipment and Shipping Charges

Describe how shipments are sent, which types of carriers are used, and how deliveries are made. Include information on point of shipment for the bulk of orders that would be filled for BCFL and where secondary points of shipment are located. Also include average shipment times and describe how shipping charges are calculated and what percent of the value of the shipment is generally represented by shipping charges (for example, "an average of 2.5% of invoice total").

If there is no charge for shipping to BCFL, so declare.

3.2.2.7. Partial Shipments

BCFL may choose to accept partial shipments from orders. Please detail how partial shipments are handled in processing, shipping, and invoicing.

3.2.2.8. Drop Shipments

BCFL requires fully processed materials drop shipped to the branch system and independent libraries with a packing slip enclosed. Provide the cost per item type to drop ship fully processed materials. On the invoice, separate the processing costs, the materials cost, and the drop shipping costs.

3.2.3. Invoicing & Payments

3.2.3.1. Invoice Format

Provide a sample invoice for books and value added services. Detail the Vendor's ability to meet the following invoice preferences:

- BCFL requires:
 - Separate billing accounts for BCFL and each of the 11 independent libraries
 - Independent libraries must be contacted directly for any overdue invoices
 - BCFL requires invoices sent via EDI to OCLC Wise.
 - BCFL prefers that value added services (processing and cataloging, and drop shipping) are added to product invoices as a separate item.
 - BCFL prefers that invoices and statements be available online.
- BCFL requires on invoices:
 - Account number
 - "Bill to" name and address

- "Ship to" name and address
- Purchase order and individual title order number
- Reference/link to packing slip
- Title/author
- Number of copies
- List price of title
- Discount (percentage)
- Discount cost for material
- Net total cost for all copies of material (after discount)

3.2.3.2. Payment

BCFL prefers to pay by check; however, payments may be made by ACH as long as they are via an online portal. Please detail payment options and discounts for early payment. Separate accounts are required for BCFL and each of the 11 independent libraries. Independent libraries must be contacted directly for any overdue invoices.

3.2.4. Customer Service

3.2.4.1. Customer Service Issues

Please describe how customer service issues are handled by the Vendor.

3.2.4.2. Customer Service Staff

BCFL prefers to have at least one dedicated staff member available to handle customer service issues that are not able to be solved by front-line customer service staff. Please include information on the Vendor's ability to accommodate this preference. Also, please list the hours that customer service staff are available and the communication methods by which they can be reached (e.g. phone, e-mail, fax, etc.).

3.2.4.3. Credits and Returns

Describe the Vendor's policy for issuing of credit and acceptance of returns for damaged shipments, short shipments, wrong titles supplied, etc. Provide samples of forms and paperwork for returns and credit. Indicate whether customers are enabled to complete a "self-credit" form for incomplete or damaged shipments and whether a return authorization number is required for returns. Also, please indicate if self-credit memos can be done by email or online.

3.2.4.4. Cancellations and Backorder Reports

Describe the types of backorder status reports provided, how frequently and in what format the reports are sent. Provide samples of the reports. Describe the cancellation policies for

orders and backordered items. Please indicate if cancellation and backordered title information is accessible online.

3.3. Vendor Value Added Service

3.3.1. Bibliographic Products, Tools, and Selection Resources

Describe any electronic bibliographic/product databases and how these databases can be accessed and used by a customer. Include descriptions of how lists can be generated by customers from the site, how such lists can be sorted, and the types of information (i.e. full title, price, format, call number, etc.) included.

Include how many staff accounts are available free of charge and if exceeded, what the cost would be for additional accounts.

Describe any Vendor-supplied electronic catalogs, selection lists, release calendars or similar resources and/or services that would help a customer identify materials appropriate for a popular, browsing collection ahead of street date.

List any charges or fees associated with use of the Vendor's bibliographic database and/or other Vendor-supplied selection tools, services, and resources.

3.3.2. Automatic and/or Standing Order Purchase Plans

Please describe any automatic and/or standing order plans offered by the Vendor that you feel would provide BCFL with opportunities to save staff time and money. Please frame the Vendor's response in terms of a popular, browsing collection.

3.3.3. Processing Services for Print Materials

Please note whether the Vendor can supply the listed processing services for the components that are being proposed. Describe the types and brands of processing materials used. Please comment on services if needed.

Please note the vendor's ability to provide two levels of processing services (fully and minimally) within the library system. Some libraries in the system may choose to have certain types of items minimally processed while others will choose fully processed. Describe how this will be handled.

Descriptions of preferred processing services for print materials:

- **Mylar plastic jacket** - Attached
- **Barcode label** - Supplied by Vendor or BCFL and affixed on the back cover of book 1/8" from top and 1/4" from spine/gutter. BCFL uses Code 39 type barcodes, 8 digits, (no check digit)
- **Spine label**-Spine labels should be printed in Arial 12pt. bold.
- **Stickers** – Genre (Mystery, Romance, SciFi, Western), New, 21 Day, 14 Day, 7 Day, Lucky Day, Holiday (Christmas, Thanksgiving, Halloween, Jewish Holidays, Generic Holiday), Easy Reader, Large Print, Graphic Novel, Teen
- **Clear spine label protector**-Affixed over the spine label on all books without Mylar jackets
- **RFID tag**- Programmed by vendor and affixed to book. BCFL uses the ISO 15693/ISO 18000- 3 mode 1.

Please list total pricing for the following combinations of processing services:

1. 'Fully processed' including Mylar plastic jacket (attached), barcode label, spine label, clear spine label protector (if applicable), Stickers, RFID tag, full cataloging services as described in *Section 3.3.8.1*
2. 'Minimally processed" including barcode label and RFID tag.

Please detail any price reductions available to BCFL based on annual spending with Vendor.

3.3.4. Processing Services for Audiobooks on CD

Please note whether the Vendor's can supply the listed processing services for the components that are being proposed. Describe the types and brands of processing materials used. Please comment on services if needed.

Please provide one or more samples of digital cover art processing services available from the vendor.

- **Clamshell case-** If necessary, repackage materials in a durable clamshell case. BCFL prefers to use vinyl or polypropylene ring binders for audiobooks on CD, with cloth lined CD sleeves.
- **Digital processing of cover art-** BCFL prefers digital processing of cover art to include barcode, number of discs and spine label.
- **Repurposing of existing artwork-** When digital processing is unavailable, BCFL prefers to affix barcode and spine label to existing artwork, maintaining as much of the original artwork as possible.
- **Barcode label** - Placed horizontally on the back cover in the upper right-hand corner 1/8 inch from top and 1/4 inch from spine or right edge of artwork.
- **Spine labels** - Printed in Arial 12 pt. bold and placed flush with the bottom of artwork on the spine.
- **RFID tag-** Programmed by vendor and affixed to the inside of the case. BCFL uses the ISO 15693/150 18000-3 mode 1.

Please list total pricing for the following combinations of processing services:

1. 'Fully processed' including: clamshell case, digital processing of cover art (when available), repurposing of existing artwork (if digital processing is unavailable), barcode, spine labels, RFID tag, full cataloging services as described in *Section 3.3.8.1*
2. Minimally processed' including clamshell case, barcode, and RFID tag.

Please detail any price reductions available to BCFL based on annual spending with Vendor.

3.3.5. Processing Services for DVDs

Please note whether the vendor can supply the listed processing services for the components that are being proposed. Describe the types and brands of processing materials used. Please comment on services if needed.

Please provide one or more samples of digital cover art processing services available from the vendor.

Descriptions of preferred processing services for DVDs

- **Removal of plastic overwrap and security stickers.**
- **Repackaging of DVDs-** If necessary, repackaging of DVDs in durable DVD- style cases.
 - Each disc must have its own hub inside the case with no overlap of discs.
 - Multidisc titles must be packaged together in one case
- **Stickers – 7Day**
- **Barcode label –** Supplied by vendor and affixed on the hub of the first disc.
- **Digital processing of cover art -** Including barcode number, number of discs, and spine label.
- **RFID tag (full disc) -** Programmed by vendor and affixed to the front of the last disc. BCFL uses the ISO 15693 /ISO/18000-3 mode 1.

Please list total pricing for the following combination of processing services:

1. 'Fully processed' including removal of plastic overwrap and security stickers, repackaging of DVDs (if necessary), barcode label, digital processing of cover art, Stickers, RFID tag, full cataloging services as described in *Section 3.3.8.1*
2. 'Minimally processed' including removal of plastic overwrap and security stickers, barcode label, and RFID tag.

Please detail any price reductions available to BCFL based on annual spending with Vendor.

3.3.6. Processing Services for Blu-ray Discs

Please note whether the vendor can supply the listed processing services for the components that are being proposed. Describe the types and brands of processing materials used. Please comment on services if needed.

Please provide one or more samples of digital cover art processing services available from the vendor.

Descriptions of preferred processing services for Blu-ray discs

- **Removal of plastic overwrap and security stickers**
- **Repackaging of Blu-Ray discs**- If necessary, repackaging of blu-rays in durable blu-ray style cases.
 - Each disc must have its own hub inside the case with no overlap of discs.
 - Multidisc titles must be packaged together in one case
- **Barcode label** – Supplied by vendor and affixed on the hub of the first disc.
- **Stickers** – 7 Day
- **Digital processing of cover art**- Including barcode number, number of discs and spine label
- **RFID tag (full disc)** - Programmed by vendor and affixed to front of the last disc. BCFL uses the ISO 15693 /ISO 18000-3 mode 1.

Please list total pricing for the following combination of processing services:

1. 'Fully processed' including: removal of plastic overwrap and security stickers, repackaging of Blu-rays (if necessary,) barcode label, digital processing of cover art, Stickers, RFID tag, full cataloging services as described in *Section 3.3.8.1*
2. Minimally processed' including removal of plastic overwrap and security stickers, barcode label, and RFID tag.

Please detail any price reductions available to BCFL based on annual spending with Vendor.

3.3.7. Processing Services for DVD/Blu-ray Combo Packs

Please note whether the vendor can supply the listed processing services for the components that are being proposed. Describe the types and brands of processing materials used. Please comment on services if needed.

Please provide one or more samples of digital cover art processing services available from the vendor.

Descriptions of preferred processing services for DVD/Blu-ray combo packs

- **Removal of plastic overwrap and security stickers**
- **Separating and repackaging of DVDs and Blu-ray discs** - If necessary, separating and repackaging of DVDs and Blu-rays into appropriate DVD and Blu-ray style cases.
 - Each disc must have its own hub inside the case with no overlap of discs.
 - Multidisc titles must be packaged together in one case
- **Stickers – 7 Day**
- **Barcode label** – Supplied by vendor and affixed on the hub of the first disc.
- **Digital processing of format-specific cover art**- Including barcode number, number of discs and spine label for both the DVD and Blu-ray edition.
- **RFID tag (full disc)**- Programmed by vendor and affixed to the front of the last disc. BCFL uses the ISO 15693 /ISO 18000-3 mode 1.

Please list total pricing for the following combination of processing services:

1. 'Fully processed' including: removal of plastic overwrap and security stickers, separating and repackaging of DVDs and Blu-rays (if necessary,) digital processing of format-specific cover art, barcode label, stickers, RFID tag, full cataloging services as described in *Section 3.3.8.1*

Please detail any price reductions available to BCFL based on annual spending with Vendor.

3.3.8. Cataloging, Classification, MARC Record and Linked Data Services

3.3.8.1. Cataloging Services

BCFL requires the following changes to generic MARC records for all titles ordered with full cataloging services:

1. The addition of a local call number in ALL CAPS to the MARC record in 092 or 099
2. Call number of 92 SURNAME for biographies
3. The addition of item-level data to the 959 MARC tag to facilitate automated record creation in OCLC Wise. Item-level data should be encoded as follows:
 - \$b Barcode
 - \$c Placement branch code
 - \$d Owning branch code
 - \$f Fund code
 - \$l Shelf
 - \$m General Material designation
 - \$n Material Type
 - \$p Price
 - \$t Call Number prefix (J,T,E)
 - \$u Call Number
 - \$v Cutter

Please describe in detail the Vendor's ability to meet the above specifications via manual or automated processes.

Please describe the Vendor's ability to provide generic MARC records for titles ordered without full cataloging services (e.g. without the MARC customizations specified above).

Please describe the Vendor's ability to search OCLC Wise for previously cataloged titles. OCLC Wise does not have the ability for a Z39.50 connection.

Please enumerate any fees for cataloging services including price per MARC record and whether the charges are at the title or item level. Please detail any price reductions available to BCFL based on annual spending with Vendor.

3.3.8.2. Classification Services

Please detail the Vendor's ability to classify materials based on the following classification schemes:

1. BCFL applies genre stickers to fiction books using the first 655 MARC tag. BCFL will provide the Vendor with a list of genres (Mystery, Romance, SciFi, Western).

3.3.8.3. Marc Record Services

BCFL requires that a MARC record be delivered for every title purchased. Please describe how the Vendor will provide MARC records to BCFL.

If Vendor is unable to provide a full and complete MARC record for a specific title that is purchased with full cataloging services as described in section 3.3.8.1, brief MARC records will be accepted as long as the item is flagged in shipment. Please describe how items ordered with full cataloging services but sent with brief MARC records will be identified in shipment.

3.4. Discounts and Terms

State the definitions and discount percentage(s) that will be provided *off* the publishers' list price for the following categories.

A. Books

1. General trade hardcovers
2. Trade paperbacks
3. Mass market paperbacks
4. Board books
5. Publisher library/ reinforced editions
6. Prebound / Vendor-bound editions
7. Large print titles
8. Small and university presses
9. World-language materials
10. Print on demand
11. Self published

B. Audiobooks on CD

1. Consumer editions
2. Library editions

C. Other non-print materials

1. DVDs
2. Blu-rays

Please list any other categories, definitions, and discount percentages. Please detail any increase in discount percentages available to BCFL based on annual spending with Vendor.

3.5. References

List at least three entities for which similar work is or has been conducted and give the name, title and telephone number of persons who may be contacted for reference concerning the services you provided. Give dates and lengths of service.

3.6. Anything not previously covered

Please use this area to describe services and/or products not already mentioned in the Vendor's proposal that may be of interest to BCFL.

4. Evaluation of Proposals

The responses to this RFP will be evaluated by a Selection Committee to be established for such purpose. Responses will be evaluated and awards will be made to selected Vendors on or around July 31, 2023.

4.1 Evaluation Criteria

Proposals will be evaluated based on the following criteria:

Section Criteria	Weight
Quoted Costs and discounts for materials and valued added services	45%
Ability of Vendor to deliver high-demand materials ahead of street date	25%
Ability of Vendor to deliver requested valued added services	20%
Understanding of need/Responsiveness to scope of RFP	10%

5. Special Conditions

5.1. Expected Time Period of the Contract

The period of any contract resulting from this RFP is tentatively scheduled to begin on or about March 1, 2024 and continue through December 31, 2027. The contract may be renewed annually until December 31, 2029.

5.2. Severability

If any terms or provisions of this Request for Proposal shall be found to be illegal or unenforceable, then such term or provision shall be deemed stricken and the remaining portions of this Request for Proposal shall remain in full force and effect.