



SNO-ISLE LIBRARIES

REQUEST FOR PROPOSAL

LIBRARY MATERIALS | NO. 2021.09.15

SNO-ISLE LIBRARIES

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

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1. OVERVIEW

Sno-Isle Libraries (the Library) is requesting proposals from vendors that supply books to Public Libraries, for the period January 1, 2022 – December 31, 2023. It is the Library's intent to use one (1) primary supplier of book materials. 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 2023, 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 one year up to two (2) times through December 2025, 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.

2. BACKGROUND

[Sno-Isle Libraries](#) is a two-county public library district serving more than 740,000 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 \$2.4 million annually for its book budget

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.

The Library currently outsources the Mylar jacketing of some hardcover books.

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.

Activity	Target Completion Date
Issuance of RFP/Inquiry Period Begins	September 15, 2021
Inquiry Period Ends	2:00pm (PDT), September 29, 2021
Final Response to Proposer Questions	5:00pm (PDT), October 6, 2021
Proposal Due Date	2:00pm (PDT), October 18, 2021
Proposal Opening to be held via Microsoft Teams. Interested vendors please contact Karen Kramer (kkramer@sno-isle.org) to obtain a link to the meeting.	2:30pm (PDT), October 18, 2021
Selection of Successful Proposer	By November 30, 2021
Initial Contract Period	January 1, 2022 to December 31, 2023

4. REQUIREMENTS & QUESTIONNAIRE

	Category	REQUIREMENTS & QUESTIONNAIRE	Scoring Weight
COST OF MATERIALS			
1	Cost of Materials	<p>1.1 Provide list of materials, in various formats (e.g. hardcover, trade paperback, library binding, etc.), with cost and with eligible discounts. Distinguish discounts between formats, type of binding, and age level where appropriate.</p> <p>1.2 What is the percentage of titles offered at full discount? Can requests for additional discounts for special library projects for underserved or at-risk populations be entertained? Note if, and what exceptions there are to the discounts or service charges.</p> <p>1.3 What is the cost information for jacketing of books? Jackets will be polyester; end papers may be lightly glued or taped. Provide cost for each combination.</p> <p>1.4 Provide details and cost information for other available processing services or packages, including shelf-ready materials, cataloging services, additional labels, etc, and any restrictions that apply.</p> <p>1.5 Can the list price of the item be automatically included in a specified subfield in each MARC tag?</p> <p>1.5(a) Is this service included as part of the contract or are there fees associated?</p> <p>1.5(b) If fees are associated, are the fees one-time for setup or an annual charge?</p>	20%
AVAILABILITY OF MATERIALS			

2	Availability of Materials	<p>2.1 List the number of titles available in inventory by format (e.g. hardcover, trade paperback, library binding, pre-bind children's materials, etc.).</p> <p>2.1(a) What is the minimum number of titles and items the Proposer keeps in stock for each format? What is the Proposer's process and timeline for providing additional copies beyond your current stock?</p> <p>2.1(b) The Library occasionally requires large quantities of title(s) to support community projects. Can the Proposer provide information about availability and fulfillment for these projects as well as any additional support needed?</p>	10%
		2.2 Describe the book formats available (e.g. hardback, paperback, pre-bind, etc.).	
		2.3 What information about each title is included for each entry? Please provide samples of entries from the product database.	
		2.4 Describe the types of titles included in the product database (e.g. only titles currently available from the Proposer, out of print titles, titles not yet published [pre-pub], titles not available from the Proposer [Must Order Direct titles], etc.).	
		<p>2.5 Does the Proposer supply book titles in languages other than English?</p> <p>2.5(a) If so, in what languages and formats?</p> <p>2.5(b) What quantity of world language titles do you currently have in your warehouse?</p> <p>2.5(c) Provide samples of any catalogs for materials in languages other than English.</p>	
WEBSITE FUNCTIONALITY			
3	Website Functionality	3.1 Describe the technological/online environment in which online selection and ordering devices operate, response time on the system and the support provided for problems using the selection and ordering system.	5%

		<p>3.1(a) By what means is technical support provided (e.g. email, phone, live chat, etc.)?</p> <p>3.1(b) What are the hours of operation for live support?</p>	
		<p>3.2 How many logins are included in standard pricing and what is the cost for additional logins?</p> <p><i>*Sno-Isle Libraries requires an administrative login and fifty (50) additional logins to the Proposer's online database, with the ability to create lists.</i></p>	
		<p>3.3 Describe the relationship between the Proposer's online selection and ordering software, and the actual generation of an order in the Proposer's system.</p> <p>3.3(a) Does the online selection and ordering software provide real-time and accurate information on titles currently in stock?</p> <p>3.3(b) If so, how many copies are available to fill orders?</p>	
		<p>3.4 What is the Proposer's commitment to ongoing enhancement and development of online selection and ordering services?</p> <p>3.4(a) Are there any upcoming enhancements?</p> <p>3.4(b) Are standing order plans available? Please list available plans. Can these plans be managed on the vendor site?</p>	
		<p>3.5 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.</p>	
		<p>3.6 Is the Proposer able to receive and correctly interpret orders in the EDIFACT format?</p>	
COLLECTION DEVELOPMENT TOOLS			
4	Collection Development Tools	<p>4.1 Describe selection product services and tools which are available. Please include a sample cart/list as well as documentation on setting up profiles.</p> <p>4.1(a) Provide trial logins to your online selection product/product datable.</p>	5%

		<p>4.1(b) Include any additional cost of collection development tools available.</p> <p>4.2 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?</p> <p>4.2(a) Is there a feature that allows the contents of a list/cart to be compared to the order history?</p> <p>4.3 What are the types of selection sources (print or online) available to customers?</p> <p>4.3(a) Provide examples of print sources and a URL for online sources, along with any cost information.</p> <p>4.3(b) Provide access to a trial account for Library staff.</p> <p>4.4 What collection analysis tools are available?</p> <p>4.4(a) What are the cost, if any, of these tools?</p> <p>4.4(b) Provide access to a trial account for Library staff.</p> <p>4.5 Does the Proposer's online database contain a link to the Library's catalog to check holds using ISBN, Universal Product Code (UPC), or Online Computer Library Center (OCLC) Control number?</p>	
ORDERING EFFICIENCY			
5	Ordering Efficiency	<p>5.1 What is the Proposer's average turn-around time from the receipt of an order to the shipment of materials?</p> <p>5.1(a) Provide a timeline for processed and unprocessed materials.</p> <p>5.2 What is the Proposer's average fulfillment rate for an order within 30 days?</p> <p>5.3 Provide any order restrictions that the Proposer has in place.</p> <p>5.4 By what other means are orders accepted (e.g. by mail, by email, by fax, by telephone, etc.)?</p>	10%

		5.5 Describe the electronic (EDIFACT) invoice capabilities.	
		5.6 Does the Proposer have any order restrictions in place? Please describe.	
		5.7 The Library purchases some items shelf-ready—fully processed with available item records. The Library will prove call numbers for these items. Can the Proposer provide access to item records—via a vendor FTP site or email—before items arrive on-site?	

DELIVERY REQUIREMENTS

6	Delivery Requirements	6.1 Provide the location of the primary warehouse and secondary warehouse, if applicable.	15%
		6.2 Provide a list of preferred freight carriers and denote the designated Sno-Isle Libraries carrier, if known.	
		6.3 Provide the expected transit time for deliveries from time of shipping to arrival at 7312 35 th Ave NE, for both primary and secondary warehouses.	
		6.4 Provide the minimum number of items or boxes required to trigger daily shipment of materials from the primary and secondary warehouses. Boxes must weigh no more than 50 pounds.	
		6.5 Box label must include Sno-Isle’s account number, ATS number, and carton number. Please identify which container contains the invoice.	
		6.6 Ability to provide a monthly report of number of items ordered and number shipped.	
		6.7 Ability to ship all containers simultaneously per order.	
		6.8 Describe the process for addressing shipping issues-- including incorrect ASN labels, shipping delays, missing invoices, warehouse issues, computing issues, etc.—that impact the Library’s ability to provide materials to customers.	

CUSTOMER SERVICE & RETURNS

7	Customer Service & Returns	<p>7.1 The Proposer is to provide a dedicated customer service representative to handle phone orders, special orders, problems, and questions. In the event that the customer service representative is unavailable due to leave or other circumstances, the Offeror will designate a back-up customer service representative. The Library also expects to have a cataloging/acquisitions specialist, a collection development specialist, and a processing/delivery specialist that can be contacted to provide any needed support in these areas. The Library must have these contacts in addition to a customer service representative.</p> <p>The Library expects to have a scheduled monthly phone/video call with the vendor team to stay on top of any issues.</p> <p>The Library requires timely notifications when vendor service may change or be degraded due to any number of internal or external factors.</p> <p>Can the Proposer provide this customer service support?</p> <p>7.1(a) 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. Can the Proposer provide this?</p> <p>Describe the ability to change processes and/or pivot as needed, i.e. if the Library needed to switch materials from processed to unprocessed or other kinds of service changes that the Library may need in an emergency. How much lead time do you require to make changes?</p> <p>Describe your Continuity of Operations (COOP) plans, including your ability to continue to provide service to the Library in the event of an emergency.</p>	20%
		<p>7.2 The Proposer will provide the Library with:</p> <p>7.2(a) Backorder status report every 30 days.</p> <p>7.2(b) Cancelled titles report every 30 days.</p> <p>7.2(c) A monthly statement of outstanding invoices and credits.</p> <p>7.2(d) A reference to the original invoice number on any credit vouchers.</p> <p>7.2(e) A monthly report of the number of items ordered and number of items shipped.</p>	

		<p>7.3 Describe any additional reports that are available.</p> <p>7.3(a) Include information about frequency, how reports are produced (e.g. generated by vendor, generated by Library, etc.).</p> <p>7.3(b) What information is included in each report? Please provide samples.</p>	
		<p>7.4 What is the Proposer's return policy?</p> <p>7.4(a) The Library expects materials received after 120 days may be returned. Can the Proposer meet this requirement?</p> <p>7.4(b) 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). Can the Proposer meet this requirement?</p> <p>7.4(c) 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. Can the Proposer meet this requirement?</p> <p>7.4(d) The Proposer will provide the Library with a list of pre-approved return authorization numbers for efficiency of returns. Can the Proposer meet this requirement?</p>	
		<p>7.5 The Library will provide processing specifications for any processed materials. Describe how you provide the Library's processing specifications to your staff. How do you ensure that items are processed correctly?</p> <p>7.5 (a)The Library expects an error rate of 2% or less with processed items. Any items that are not processed correctly will be documented and the Library will be refunded the processing fee. Can the Proposer meet these requirements?</p>	

COMPANY INFORMATION

8	Company Information	8.1 Company name, business address and phone number.	
		8.2 Number of years Proposer has been in business.	
		8.3 Name of Parent company, if any.	

		8.4 Name of Company's President / CEO.	
		8.5 Name of Company's Director of Operations.	
		8.6 Name of Company's Director of Sales.	
		8.7 Name of Company's Director of Customer Service.	
		8.8 Name of designated Customer Service Representative (and contact information).	
		8.9 Three (3) references including a contact person for each reference. 8.9(a) The Library requests these references be major urban libraries.	

5. QUESTIONS REGARDING RFP

Any questions surrounding this RFQ/RFP must be submitted via email to vendorsubmissions@sno-isle.org in accordance with **Section 3**. **Questions via telephone will not be accepted.**

Responses to questions will be posted on Sno-Isle Libraries' website as an addendum to this RFP (<https://www.sno-isle.org/vendors/>; click on *Current Projects*), and will be distributed to all email addresses related to this Proposal. **Responses will be provided by 5:00pm PDT, Wednesday, October 6, 2021.**

6. PROPOSAL REQUIREMENTS

6.1 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.

6.1.1 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.

6.1.2 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.

6.1.3 Format

Please respond to each requirement & question in Section 4. Vendor’s response to each of these requirements & questions should follow the numbering in the table 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 and questions prior to preparing a proposal.

6.1.4 Signed Certifications and Assurances

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

6.2 Submitting a Proposal

The Proposal and all other documents required to be submitted with the Proposal shall be enclosed in a sealed envelope marked “Proposal submitted by” followed by the name and address of the bidder and the designated project name.

- If the Proposal is mailed, it shall be addressed to Sno-Isle Libraries: 7312 35th Ave NE, Marysville, WA 98271; ATTN: Procurement Specialist.

- If the Proposal is delivered, it shall be delivered to Sno-Isle Libraries' Service Center, with is located at 7312 35th Ave NE, Marysville, WA 98271; ATTN: Procurement Specialist.
- Oral, telephonic, telefaxed, electronic or telegraphic Proposals are invalid and will not receive consideration.
- **If you would like confirmation of receipt of Proposal, please request via email at the time of submission.**

The proposal should be organized in a manner that allows the reviewer to evaluate the firm's qualifications quickly and easily. The Proposal shall be no more than 25 pages in length, excluding the cover, a one- or two-page Letter of Interest, and section dividers, provided the text of the response is not printed upon them. **The interested firm or group must provide one (1) printed sealed copy and one (1) electronic copy of the proposal (to vendorsubmissions@sno-isle.org) subsequent to the opening of proposals.**

6.3 Revision of Proposals

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

7. EVALUATION PROCESS

All responsive Proposals will be evaluated by a team of at least three (3) 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 in each material format 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;
2. Cost of materials and discounts proposed;
3. Quality and completeness of information provided in the proposal; and
4. Past experience with the Library (if any) and references.

Scores will be weighted as follows:

(65%) The quality and feasibility of the Response to Scope of Services Requirements as determined by these five categories:

- (10%) Availability of materials
- (10%) Website functionality (5%) and collection development tools (including OCLC) (5%)
- (10%) Ordering efficiency
- (15%) Delivery requirements
- (20%) Level of customer service and returns handling;

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

(10%) 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, reliability of discounts, and customer service responsiveness.

(20%) The cost or pricing structure of the Proposer's Cost Proposal.

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 services 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.

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 or designee. 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.

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



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 60 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, 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