



**BURLINGTON PUBLIC LIBRARY
REQUEST FOR PROPOSAL (RFP)**

LIBRARY MATERIALS VENDOR

October 16, 2013

Deadline: Friday, November 1, 2013 at 5 p.m. (Pacific Time)

Submit to:

ATTN: Library Materials Vendor RFP

Maggie Buckholz, Library Director

maggieb@burlingtonwa.gov

Burlington Public Library

820 E Washington Ave

Burlington, WA 98233

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I. Background

The City of Burlington (“City”) has a population of 8,445. The Burlington Public Library (“BPL”), a department of the City, offers materials of all types, including hardcover and paperback books, audiobooks, music, videos, and other formats; suitable for all ages from infant through senior citizens. Collections focus on popular reading, listening, and viewing; curriculum support for elementary and secondary schools; and independent learning. Special emphasis is placed on providing Spanish language materials for our growing Latino population. BPL’s budget for Library Materials will be approximately \$50,000 in 2014.

BPL currently uses the Evergreen Integrated Library System (ILS) version 2.4. The Library intends to implement Evergreen’s Acquisitions module starting in January 2014, including electronic ordering and invoicing using the Electronic Data Interchange (EDI) family of standards.

II. Scope of Work

The Burlington Public Library issues this Request for Proposal (“RFP”) to solicit proposals from vendors that supply books, audiovisual materials, and electronic resources (collectively “Library Materials”). Library Materials must comply with current copyright and intellectual property laws.

The information submitted in proposals will be used to evaluate and qualify vendors to supply Library Materials. There is no guarantee that a prequalified vendor will receive any contract, or of the actual amounts, if any, which will be purchased under such a contract. The contract will not be exclusive, as BPL will continue to purchase Library Materials from a number of vendors.

The selected vendor or vendors will provide BPL with Library Materials for a period of three years, starting on January 1, 2014, and continuing until December 31,

2016. BPL is seeking an ongoing relationship with the chosen vendor or vendors, but will re-evaluate vendors' pricing on an annual basis.

III. Submission Requirements

Proposals will be accepted at the City of Burlington, in the office of the Library Director, 820 E Washington Ave, Burlington, WA 98233 until the date and time shown in Section IV, below.

Interested vendors must provide either one electronic or one paper copy of their proposal. Electronic proposals shall be in PDF or Microsoft Word format. Paper proposals must be submitted in a sealed envelope or box clearly labeled "Library Materials Vendor Proposal".

Completed proposals must be submitted prior to the submission deadline to:

ATTN: Library Materials Vendor RFP

Maggie Buckholz, Library Director
maggieb@burlingtonwa.gov
Burlington Public Library
820 E Washington Ave
Burlington, WA 98233

Proposals must be complete and must adhere to **Section VIII. Format and Content of Proposals**. The information requested is essential for the prompt evaluation of all proposals. The City reserves the right to declare as non-responsive and reject any proposal in which material information requested is not furnished or where indirect or incomplete answers or information is provided. Proposals or any modification or corrections to proposals received after the closing submission deadline will not be considered. Proposals may be submitted via United States regular mail or e-mail. Proposals received via phone, facsimile, or other means will not be accepted.

The City reserves the right to reject any or all proposals and to waive any irregularities. The City reserves the right to revise or amend this RFP up to the proposal submission deadline. The City will provide amendments to all prospective respondents listed on the City's RFP holder list. If amended, the City may postpone the date set for opening proposals by a number of days, as determined by the City in its sole discretion, to allow time for vendors to revise their proposals.

Vendor certifies, by signing and submitting a proposal, that no officer, agent or employee of the City has a pecuniary interest in the proposal; that the proposal is made in good faith without fraud, collusion, or connection of any kind with any other respondent; that the proposal is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation; and that all statements contained in the proposal are true.

This RFP can be obtained at the Burlington Public Library, 820 E Washington St, Burlington, WA 98233 or by calling Maggie Buckholz at (360) 755-0760 and requesting a package to be mailed or emailed. You may also download this RFP package from the Library's website at <http://burlingtonwa.gov/Index.aspx?NID=439>, or by clicking on "Invitation to Bid" in the "About Us" section of the library's website (<http://burlingtonwa.gov/library>).

IMPORTANT: If you are downloading this RFP from the Internet you must call Maggie Buckholz at (360) 755-0760 immediately to register your intent to submit a proposal. This enables us to provide you with any necessary clarification or addendums to this RFP. *Failure to do so may disqualify your submittal.* Please provide your company's name, contact name, mailing address, telephone number and email address.

IV. Submission deadline and timeline

Proposals are due no later than 5:00 p.m. Pacific Daylight Savings Time on Friday, November 1, 2013.

Release date: October 16, 2013

Proposals due: November 1, 2013

Proposed review: November 5, 2013

Proposed award: November 14, 2013

Vendor notification of award: November 15, 2013

V. Evaluation Criteria

Evaluation of proposals will be performed by the Library Director. The Director will review all information submitted, and will select, in the City's sole and absolute discretion, the vendor or vendors that the director believes have the qualifications and experience necessary to provide the materials specified in this RFP. The selection process will be based on the lowest cost of materials provided by the vendor that meets all of the qualifications listed in **Section VII. Qualifications for Book Vendors**. The "lowest cost of materials" will be determined by multiplying the proposed discounts by the weighted factors listed in the "Discounts for Library Materials" chart on page 13 for the required formats, plus "Additional Charges" on page 14. In the event of a tie, the Director will consider the following items in priority order, after the discounts are applied: (1) Additional charges/fees, (2) Online ordering system, (3) Size of inventory, (4) Length of standard order service period, (5) Experience/References, (6) Vendor's ability to provide EDI orders and invoices, and (7) any other factors deemed relevant in the best interests of BPL.

VI. Contact Information

The City employee authorized to provide information or to answer questions regarding this RFP is:

Maggie Buckholz
820 E Washington Ave
Burlington, WA 98233
Phone: (360) 755-0760
Fax: (360) 755-0717
Email: maggiieb@burlingtonwa.gov

All questions or requests for interpretations or clarifications must be in writing and addressed as indicated above. Any City response to a question or a request for an interpretation will be in writing and copies provided to all vendors who appear on the list of RFP holders.

VII. Qualifications for Book Vendors

To qualify, the Library shall evaluate whether the vendor's proposal meets the Minimum Qualifications stated below.

Materials and stock

1. Vendor shall be able to provide Adult Fiction and Nonfiction print titles.
2. Vendor shall be able to provide Teen Fiction and Nonfiction print titles.
3. Vendor shall be able to provide Juvenile Fiction and Nonfiction print titles.

Customer services

1. The vendor shall designate a sales representative to serve as the vendor's representative to BPL.

2. The vendor shall provide toll-free customer service phone numbers and e-mail addresses for primary contacts and service specialists, for use by BPL staff.
3. The vendor will demonstrate prior successful provision of Library Materials to similar libraries as verified by references.

Selection and collection development

1. The vendor shall operate a website that provides BPL with bibliographic information and stock information. The website shall provide BPL with the ability to create individual shopping carts that can all be managed by a central BPL administrative account.
2. The vendor shall provide suggested selection lists for adult fiction, adult nonfiction, teen, and juvenile, from which BPL staff may select titles. These selection lists shall be created by vendor's staff, rather than by the vendor's other customers.
3. The vendor shall provide full-text reviews from professional journals (such as *Publishers' Weekly*, *Library Journal*, *School Library Journal*, *VOYA*, and *Booklist*).

Ordering and order fulfillment

1. The vendor will agree to impose no minimum order per shipping location requirement during the life of this contract.
2. The vendor shall offer the ability to place standing orders via its website or some similar means. BPL shall be able to place standing orders for new titles, cancel standing order titles, and claim volumes in standing orders that were not received.
3. The vendor shall provide monthly reports on items ordered and their status.

ILS integration

1. Vendor must support Enriched EDI for ordering and invoicing.

2. Vendor must have experience with other libraries that use Evergreen ILS.
3. Vendor will be a WorldCat Cataloging Partner, and shall be able to provide information to the Online Computer Library Center (OCLC) about materials ordered by BPL.

Invoicing

1. Vendor must support both print invoices and electronic invoices via EDI.
2. Print invoices shall display "Burlington Public Library," BPL's account number, and be itemized with the following information: titles, authors, ISBNs, binding, quantities, list prices, and the percentage discounted from publisher's list price for each title, net cost after discount/extended price, shelf-ready costs, sales tax, and shipping costs.
3. Terms of payment shall be no less than 30 days.

Shipping and delivery

1. Unless otherwise specified by BPL, library materials are to be delivered to: Burlington Public Library, 820 E Washington Ave, Burlington, WA 98233.
2. The vendor shall not charge shipping fees that exceed standard USPS or UPS shipping rates.
3. All Library Materials must be adequately protected to prevent damage during shipping.
4. Shipping containers, including contents, shall not weigh more than 50 pounds.

Returns

1. Returns for credit or replacement of damaged or defective items, items not ordered, and/or items deemed not appropriate shall be allowed without requesting authorization, at no cost. Vendor shall detail all returns policies in their proposal.

The Library also requests that vendors provide information about their ability to provide the optional value-added services stated below.

Optional Cataloging and Physical Processing

1. Vendor will preferably be able to provide acceptable library binding services for juvenile books. Acceptable library bindings include those provided by Marshall Cavendish and Lerner. Unacceptable library bindings include those provided by Turtleback. Other bindings may be considered on a case-by-case basis.
2. Vendor will preferably be able to provide MARC records that utilize MARC 21 Format for Bibliographic Data, and adhere to either Anglo-American Cataloging Rules Second Edition (AACR2) 2005 Update and relevant Library of Congress Rule Interpretations, or Resource Description and Access (RDA) and relevant Library of Congress/Program for Cooperative Cataloging Policy Statements.
3. Vendor will preferably be able to provide a 9xx field in each bibliographic record. This field shall be populated with order information, including fund, shelving location, item price, order date, and rush information as applicable.
4. For non-fiction materials, the vendor will preferably be able to classify items according to the current edition of Dewey Decimal Classification (currently 23rd Edition).
5. The vendor will preferably be able to provide Library of Congress Subject Headings (LCSH) and Book Industry Standards and Communications (BISAC) Subject Headings, and Library of Congress Children's Subject Headings.
6. The vendor will preferably be able to provide shelf-ready materials with spine labels and barcodes applied per library standards.

VIII. General Provisions

1. LAWS AND REGULATIONS: Proposers will comply with all applicable Federal, State and Local laws, statutes and ordinances.
2. Inspections: BPL will have the right to inspect any of the goods covered by this RFP. All goods are subject to BPL's inspection and approval upon arrival. If rejected, they will be held for disposal at the Proposer's risk. Such inspection, or the waiver thereof, however, will not relieve the Proposer from full responsibility for furnishing goods conforming to the requirements of this RFP or the RFP Specifications, and will not prejudice any claim, right, or privilege BPL may have because of the use of defective or unsatisfactory goods.
3. Termination:
 - A. Default - BPL may terminate all or any part of a subsequent award by giving notice of default to Proposer, if Proposer:
 - (i) refuses or fails to deliver the goods within the time specified;
 - (ii) fail to comply with any of the provisions of this RFP or so fails to make progress as to endanger performances, hereunder, or;
 - (iii) becomes insolvent or subject to proceedings under any law relating to bankruptcy, insolvency, or relief of debtors. In the event of termination for default, BPL's liability will be limited to the payment for goods and services delivered and accepted as of the date of termination.
 - B. Convenience - BPL may terminate for its convenience at any time, in whole or in part any subsequent award. In which event of termination for convenience, BPL's sole obligations will be to reimburse Proposer for
 - (i) those goods or services actually shipped/performed and accepted up to the date of termination, and
 - (ii) costs incurred by Proposer for unfinished goods, which are specifically manufactured for BPL and which are not standard products of the Proposer, as of the date of termination, and a reasonable profit thereon. In no event is BPL responsible for neither loss of anticipated profit nor will reimbursement exceeds the RFP value.
4. Audit and Inspection: The City or its representative reserves the right to inspect and/or audit all the proposer's documents and records as they pertain to the products delivered under this agreement. Such rights will be exercised with notice to the Proposer to determine compliance with and performance of the terms, conditions and

specifications on all matters, rights and duties, and obligations established by any agreement resulting from this RFP. Documents/records in any form shall be open to the City's representative and may include but are not limited to all correspondence, ordering, payment, inspection, and receiving records, contracts or subcontracts that directly or indirectly pertain to the transactions between the City and the Proposer.

5. Independent Contractor. The relationship between BPL and the Proposer shall, at all times, be construed as an arm's length business transaction. The arrangement is not a joint venture or any other form of combined business enterprise.

6. Terms of Payment: The terms of payment will be Net 30 Days from the latter of receipt and acceptance of goods, or receipt of Proposer's invoice.

IX. Format and Content of Proposals

To facilitate evaluation, each vendor's proposal is required to include the information listed in the order shown. If vendor's proposal is not in the following format or does not include all of the listed items and requirements, it may be deemed non-responsive.

Firms interested in responding to this RFP must submit the following information, in the order specified.

The proposal consists of three parts and two attachments:

Part 1: Introduction and Executive Summary, as specified below.

Part 2: Types of library materials the vendor proposes to supply, discounts for specific categories and formats, additional charges including tax and shipping, and related questions.

Part 3: Vendor's ability to meet required qualifications. Types of added services the vendor proposes to provide including collection development, optional services for cataloging and processing, and related questions.

Attachment 1: Vendor's Return Policy

Attachment 2: Sample invoice from a materials order listing tax, shipping, and other charges for at least one (1) item. The sample invoice should include at least one (1) item with optional shelf-ready and cataloging charges if the vendor provides these optional services.

Part 1: Introduction and executive summary

Submit a letter of introduction and executive summary of the proposal, **using no more than 3 pages** plus the cover sheet. At a minimum, Part 1 should include:

1. A completed cover sheet, as provided in this RFP **Attachment B**.
2. Information describing the vendor's company and vendor's primary business and market focus, including length of time in business, general business history, standing order capability, and amount of stock in inventory for any library materials addressed in Part 2 below.

Part 2: Library materials and Charges

A. DISCOUNTS FOR LIBRARY MATERIALS

Indicate the discounts from publisher's list price that you would provide on materials ordered during 2014. Discounted charges for library materials shall be firm and fixed for the specified contract period. Vendor shall base all discounts on publisher's list price. Please provide a single number for each category, rather than a range of discounts or an average discount. Note that any change in discount must be negotiated with BPL.

REQUIRED FORMATS	DISCOUNT	WEIGHT FACTOR
Adult Trade Hardcover	%	50
Adult Quality/Trade Paperback	%	20
Adult Mass Market Paperback	%	2
Teen Trade Hardcover	%	7
Teen Quality/Trade Paperback	%	3
Juvenile Trade Hardcover	%	10
Juvenile Quality/Trade Paperback	%	4
Publisher's Library Binding	%	2
School Library Binding	%	2

OPTIONAL FORMATS	DISCOUNT
Large Print Trade Hardcover	%
Large Print Quality/Trade Paperback	%
Spanish Hardcover	%
Spanish Paperback	%

Short Discount	%
Unabridged Audiobooks on CD	%
Entertainment DVDs	%
Documentary DVDs	%
Music CDs	%

B. ADDITIONAL CHARGES

Please list any additional charges for the following:

Shipping _____

Handling _____

Storage _____

Other (please itemize): _____

Do you offer the replacement of single CDs or DVDs for damaged audiobooks and videos in a set? ___ Yes ___ No

Are there fees for single disc replacements?

___ Yes ___ No

Are there any restocking fees applied to returns?

___ Yes ___ No

If so, what is the charge? _____ per unit

Do you add sales tax to Library Materials orders?

Yes No

If you add sales tax to Library Materials orders, do you report this to the Washington State Department of Revenue? Yes No Not applicable

Please list any rush fees that you charge.

Please list any and describe additional fees and charges.

Part 3: Ability to meet required qualifications

Please address the following questions to demonstrate your ability to perform each of the requirements listed in **Section VII. Qualifications for Book Vendors** in this RFP.

Please include at least three (3) public libraries to which you have provided Library Materials as references, using the **Attachment C** form provided herein.

Materials and stock

How many titles do you typically have in stock?

What is your usual first fill rate? Choose one.

_____ 91-100%

_____ 76-90%

_____ 50-75%

_____ less than 50%

Identify the types of materials you provide (Check all that apply):

- _____ Adult trade hardcover books
- _____ Adult trade paperback books
- _____ Adult mass market paperback books
- _____ Teen trade hardcover books
- _____ Teen trade paperback books
- _____ Juvenile trade hardcover books
- _____ Juvenile trade paperback books
- _____ Publisher-bound library binding books
- _____ Vendor-bound library binding books
- _____ Spanish trade hardcover books
- _____ Spanish trade paperback books
- _____ Large print trade hardcover

- books
- Large print trade paperback
- books
- Audiobooks on CD
- Replacement CDs for audiobooks
- Entertainment DVDs
- Replacement DVDs for DVD sets
(e.g. television series)
- Music CDs
- eBooks
- (specify platform: _____)

Identify the languages in which you provide Library Materials (Check all that apply):

- English
- Spanish
- Chinese
- Japanese
- Korean
- Russian
- Tagalog
- Ukrainian

Selection and collection development

What selection tools are available to the Library for selecting Library Materials from your firm? Check all that apply.

- Print catalogs
- Online catalogs
- Customized book lists
- Booklist reviews
- Bulletin of the Center for
Children's Books reviews

- _____ The Horn Book Guide reviews
- _____ The Horn Book Magazine reviews
- _____ Kirkus reviews
- _____ Library Journal reviews
- _____ Publisher's Weekly reviews
- _____ School Library Journal reviews
- _____ Voices of Youth Advocates (VOYA) reviews
- _____ Other professional reviews:

- _____ Other professional reviews:

- _____ Other selection tool:

- _____ Other selection tool:

If your firm provides customized book lists, please list three (3) examples.

Does your ordering interface provide individual shopping carts that can be managed by a central library administrative account? ___ Yes ___ No

Does your ordering interface notify selectors when they attempt to order materials that have been previously purchased by the library?

___ Yes ___ No

Ordering and order fulfillment

Can you accept orders placed electronically using EDI?

___ Yes ___ No

Do you support interface with the Evergreen Acquisitions Module?

___ Yes ___ No

Can you provide monthly reports on items ordered and their status?

___ Yes ___ No

Is there a charge to access these reports? ___ Yes ___ No

If so, what is the charge for each report?

Do you impose a minimum order per shipping location requirement?

___ Yes ___ No

Do you support the placement and cancellation of standing orders?

___ Yes ___ No

Can a library claim volumes in standing orders that were not received?

Yes No

ILS integration

Do you have experience with other libraries that use Evergreen ILS?

Yes No

Shipping and delivery

What is your standard order service period (from date of order to receipt by Library)?

_____ days

Returns

Do you allow returns to be claimed on your website?

Yes No

Will you accept the return of publisher defective books up to one year from receipt by BPL and issue full credit with no restocking fee?

Yes No

Does the returns policy differ for cataloged/processed items?

Yes No

If so, how?

Is the Library required to obtain a return authorization before returning damaged or defective items, or shipment errors?

Yes No

Invoicing

Can you provide electronic invoicing via EDI? Yes No

Are your terms of payment 30 days or more? Yes No

Optional Value-Added Services - Cataloging and Processing

Do you provide library binding services? Yes No

If so, what binding company or companies do you use?

Can you provide shelf-ready materials with spine labels and barcodes applied per library standards? Yes No

Do you provide MARC records? Yes No

If so, what is the encoding level of original cataloging performed? Select one:

Full level

1: Full level, material not examined

- 2: Less than full level, material not examined
- 3: Abbreviated level
- 4: Core level
- 5: Partial (preliminary) level
- 7: Minimal level
- 8: Pre-publication level
- I: Full-level input by OCLC participant
- K: Less-than-full input by OCLC participants
- L: Full-level input added from a batch process
- M: Less-than-full added from a batch process

What cataloging codes do you adhere to? Check all that apply.

- Anglo-American Cataloging Rules Second Edition (AACR2) 2005 Update
- Anglo-American Cataloging Rules Second Edition (AACR2) other update
- Resource Description and Access (RDA)

Can you provide a custom 9xx containing order information in MARC records?

Yes No

Are you able to classify items according to the current edition of Dewey Decimal Classification (currently 23rd Edition)?

Yes No

Can you provide the following subject headings? Check all that apply.

Library of Congress Subject Headings (LCSH)

Book Industry Standards and Communications (BISAC) Subject Headings

Library of Congress Children's Subject Headings

Bilindex Spanish Subject Headings

Queens Borough Public Library Spanish Subject Headings

San Francisco Public Library Spanish Subject Headings

Identify the languages for which you perform cataloging:

English

Spanish

Chinese

- Japanese
- Korean
- Russian
- Tagalog
- Ukrainian

How much do you charge for each MARC record?

Are you a WorldCat Cataloging Partner, capable of providing information to the Online Computer Library Center (OCLC) about materials ordered by BPL?

Yes No

How much do you charge per item for shelf-ready materials (with barcodes and spine labels)?

ATTACHMENT A

**BURLINGTON PUBLIC LIBRARY
MATERIALS VENDOR RFP**

SAMPLE PURCHASE DISTRIBUTION

2014 Budget for Monographs, Annuals, and Media

Up to \$47 250

Costs include all materials, processing, cataloging, vendor charges, delivery, tax, etc.

	<u>Dollar Amount</u>	<u>Approximate % of total</u>
Adult Fiction	\$ 10,000	22 %
Adult Non-fiction	\$ 10,000	22 %
Reference	\$ 6,200	13.5 %
Juvenile – Fiction	\$ 4,500	10 %
Juvenile – Non-Fiction	\$ 3,200	7 %
Teen Fiction	\$ 2,000	4.5 %
Teen Non-fiction	\$ 1,500	3.5 %
Spanish and non-English	\$ 1,500	3.5 %
DVDs	\$ 1,500	3.5 %
Large Print	\$ 1,500	3.5 %
Adult E-books	\$ 1,200	2.5 %
Audiobooks	\$ 800	2 %
Juvenile – DVDs and Music	\$ 750	1.5 %
Music	\$ 350	1 %

ATTACHMENT B

**BURLINGTON PUBLIC LIBRARY
MATERIALS VENDOR RFP**

COVER SHEET

Name of firm: _____

Mailing address: _____

Toll-free telephone number: _____

Email address: _____

Website: _____

Primary contact at firm: _____

Primary contact's email address: _____

Primary contact's telephone number: _____

Designated sales representative: _____

Sales representative's email address: _____

Sales representative's telephone number: _____

ATTACHMENT C

**BURLINGTON PUBLIC LIBRARY
MATERIALS VENDOR RFP**

REFERENCE SHEET

LIBRARY SYSTEM: _____

LIBRARY BRANCH: _____

ADDRESS: _____

LIBRARY CONTACT: _____

CONTACT TITLE: _____

CONTACT PHONE: _____

CONTACT EMAIL: _____

DATES OF SERVICE: _____

TYPE OF SERVICE: _____