

**SCOPE OF SERVICES
REQUEST FOR PROPOSAL FOR
LIBRARY BOOKS & MEDIA MATERIALS**

I. General Information

The City of Milwaukee, acting through the Board of Trustees, Milwaukee Public Library (Board) seeks proposals from qualified firms for the purchase of books and media materials published or distributed in the United States. The Milwaukee Public Library consists of the Central Library, twelve branch libraries, and one kiosk library.

The Milwaukee Public Library (Library) estimates net annual materials expenditures to be \$1,000,000. Past patterns indicate that expenditures are divided as indicated under Classifications. These figures are estimates only. Changing budgets, community needs, and service patterns could, however, result in a different mix and amount of purchases. There is no guarantee as to the actual volume or dollar amount that will be purchased.

II. Minimum Requirements

The Milwaukee Public Library's objective is to contract with a firm(s) that has (have) proven experience with supplying high volume orders for library systems. The proposer must provide evidence of experience with handling a high volume of orders for a broad variety of materials for each classification for which a proposal is submitted. Evidence of experience shall include but not be limited to providing the name and address of three other libraries for which similar type and volume of work was performed within the last two years, along with the name, title, telephone number, and email address of a contact for each user.

III. Proposal Due Date

The response to the RFP, in its entirety, must be received by the Business Office of the Milwaukee Public Library no later than 3:00 p.m. on the date specified in the Official Notice and the RFP. All proposals and accompanying documentation will become the property of the Milwaukee Public Library and will not be returned. Late proposals will not be accepted.

IV. Proprietary Proposal Material

Any information contained in the proposal that is proprietary must be clearly designated. Marking the entire proposal as proprietary will be neither accepted nor honored. If any information is marked as proprietary in the proposal, such information will not be made public.

V. Definitions

- A. **Dealers:** The phrase "dealers" shall be construed to mean only those dealers who are now in the regular book or media library material business, either wholesale or retail, carrying a general stock of books and/or media material. This shall include a substantial stock of the materials likely to be purchased by the Milwaukee Public Library.
- B. **Stock:** Stock may include one or more of the following types of materials: books of adult, juvenile, and young adult fiction and non-fiction in trade, softcover, university press, large print, single library editions, board book and big book editions, mass-market or publishers' reinforced bindings; continuations; music compact discs; audiobooks; informational and entertainment DVDs. All of these shall be furnished in whatever trade, technical, or reprint editions that are available.

VI. Scope of Services

A. Books and Media Materials

1. Stock Items

Each proposer shall state in its proposal the minimum number of titles it stocks for each type of material described in Classifications, and the average overall number of stock items kept in inventory but with the further provisions that such a stock should consist of materials, which are currently published or were published no earlier than five (5) years prior to the current season. Facts relative to stock carried will be considered in determining the successful bidder. For purposes of this agreement, items shall be considered "In Stock" if copies are available in the vendor's service or distribution facility that ships to the Library.

2. Non-Stock Items

Each proposer shall also indicate in the proposal its ability to supply materials not in regular stock or materials temporarily out-of-stock in its warehouse by stating the length of time between determination that an ordered title is not fillable from current stock and when the vendor will place orders with publishers or other suppliers to fill these orders. These materials shall be "special ordered" and not held to be combined with future incoming orders. These materials shall also carry the same discounts as the in-stock items.

Orders received under this contract for items not currently in stock must be placed with the publisher or supplier within a maximum of five (5) working days.

B. Shipments and Reports

All materials provided under this agreement shall be shipped in the most expeditious manner, from any of the vendor's warehouse or distribution facilities, at the contractor's expense, F.O.B. destination. Individual shipments should not exceed 50 pounds per box.

The contractor shall, according to terms and conditions of the executed contract, make partial shipments of the requested number of copies ordered when complete shipments are unavailable upon receipt of the order.

In addition, each proposer shall state the guaranteed lead-time for in-stock materials. The standard of performance for this guarantee is that shipments of at least 50% of the titles ordered are made not later than three (3) working days from the date of receipt of order, unless special processing services are also requested. In this instance, shipments are to be made not later than five (5) working days from the date of receipt of order.

Within 30 days of receiving an order, the supplier shall submit to the Milwaukee Public Library an electronic status report of all back ordered materials that are temporarily out-of-stock, out-of-stock indefinitely, out-of-print, or otherwise unavailable.

At the end of the requested backorder period, the supplier shall submit an electronic cancellation report for those orders it cannot fill. The Library reserves the right to order these materials elsewhere.

C. Classifications

1. Class A: General Trade Books (Adult) – 20%

Includes practically all regular items of fiction, popular non-fiction, and miscellaneous books, and all books which dealers can buy at a “long” discount and which are generally known as “long discount trade publications”.

All books will be considered as offered by the proposer under the discount stated for this Class A if they are in fact “long discount trade publications” even though, because of the nature of the publications or their content they might be grouped in some other class.

2. Class A: General Trade Books (Juvenile & Young Adult) – 10%

Same as “A” above except for juvenile and young adult. This classification includes Children’s Board Books.

3. Class B: University Press (Adult) – 1.5%

Covers publications issued by University Presses. Hardcover and softcover.

4. Class C: Non-Trade Books (Adult) – 18%

This class includes educational and technological books which are not “long discount trade publications”; all books which are billed to dealers at a short discount and may be known as “short discount publications”; reference books not included in Class A; miscellaneous publications from publishers whose discount to dealers varies from the discount allowed on books in Class A; special editions; the output of special publishers; or other books which may not fall into the above classes.

Books, which by their nature might be considered under this class, will nevertheless be furnished at the discount offered by the proposer under Class A if such books, notwithstanding the nature of their content, are furnished to the trade by the publisher at long discounts and can, therefore, be considered as “long discount trade publications”.

5. Class D: Single Library Editions (Juvenile & Young Adult) – .5%

These books are juvenile and young adult titles, generally available in only one binding, described by the publisher as a guaranteed binding or library edition.

6. Class E: Publishers’ Reinforced Bindings (Juvenile & Young Adult) – .5%

These books are juvenile and young adult titles, sometimes known as “publishers’ library editions”, “school library editions”, or “publishers’ library bindings”. They are generally offered as one of two available bindings for a title and are reinforced bindings that are intended to withstand heavy use by children.

7. Class F: Softcover Books (Adult) – 13%

This class includes both books known as quality or trade paperbacks and mass-market paperbacks.

8. Class F: Softcover Books (Juvenile & Young Adult) – 11%

Same as “F” above except for juvenile and young adult.

9. Class G: DVD Recordings (Adult, Juvenile & Young Adult) – 13%

This class includes only DVD recordings. Recordings may be educational, informational, or entertainment.

10. Class H: Audiobook Compact Discs (Adult, Juvenile & Young Adult) – 4.5%

This class includes non-musical sound recordings of literary works in CD format.

11. Class I: Music CDs (Adult, Juvenile & Young Adult) – 3%

This class includes musical sound recordings in CD format.

12. Class J: Large Print (Adult) – 2.5%

This class includes adult hardcover and softcover books printed in large type editions.

D. Invoicing and Payments

Invoices for materials supplied shall include the Library generated purchase order number for each line item. Print invoices shall be included with all shipments, not sent separately until such time as the library requests an alternative electronic access.

The successful proposer must allow the Milwaukee Public Library to short pay invoices in cases where items are invoiced but not received, or where items are being returned because they are defective or were shipped to the Milwaukee Public Library in error.

E. Continuation Orders

While most orders under this contract will be firm orders, proposers shall indicate their ability to supply, on standing order, titles in series, publications by popular authors, popular media items, or titles issued with a pattern of regularity. Where applicable, proposals for standing orders are requested according to the category of material. Invoices for materials supplied shall include the Library generated purchase order number for each line item except in circumstances where continuations are not aligned with a specific series.

Responsibility to supply at the time of publication rests with the vendor. Failure to do so requires that the vendor notify the library of delays, supply the material at a later date at the request of the Library at the discounted firm order price for the category of publication.

F. Returns

The Library reserves the right to return for full credit any and all materials. Return freight costs applicable to this type of return will be the responsibility of the Library. The Library also reserves the right to designate the edition desired, refuse to accept an edition other than that designated, and to return for replacement, and/or full refund or credit all items which are in any way imperfect, incomplete or defective, and all items sent in error. Return freight costs applicable to this type of return shall be the responsibility of the vendor.

G. Reservations

The Library reserves the privilege of purchasing the following items elsewhere:

1. Pre-bound books
2. Books published by bodies that do not exist primarily to publish, e.g. academics, associations, clubs

3. Secondhand books
4. Proceedings
5. All unbound material
6. All editions in special binding
7. All net-priced books
8. All books offered on special sales and remainders
9. "Bargains" offered at prices equivalent to 5% additional discount from list beyond the discounts in the contract under the classes listed in the RFP

The Library also reserves the right to purchase directly from publishers or local businesses as the need arises. Furthermore, the terms of this contract shall not preclude purchases under approval plans, automatic purchase profiles, standing orders; or purchases of books pre-processed where such processing services are unavailable from the successful proposer(s).

H. Processing Services

The Milwaukee Public Library may purchase processing services as specified, if available, for most books and media purchased under the contract but does not guarantee purchase. The Library may not begin purchasing processing services for these materials immediately. These may be purchased later in the term of the contract.

Proposers are asked to indicate availability and unit cost for providing the following material processing services for the following material types in their proposals:

1. Books

- a. Application of plastic dustjacket covers (PlastiKleer) to books with dust jackets and attachment of covers to books. Jacket costs per title must be calculated in the extended price of each processed book on the accompanying invoice.
- b. Application of Library provided barcodes, as specified by the Milwaukee Public Library, to books under plastic dust jacket cover when a dust jacket is present.
- c. Application of Milwaukee Public Library provided RFID tags as specified by the Library to books. Vendors should list costs associated with programming the tags separately from the application costs. The Milwaukee Public Library uses the RFID system by Bibliotheca.

2. Media Materials

- a. Application of library property ownership by name labels to Audiobook, CD and/or DVD cases and pieces or the ability to scan and integrate this information onto the existing cover art. For media materials, the ownership label should be applied to each Audiobook, CD, or DVD in a multi-disc set.
- b. Application of Library provided RFID tags to Audiobook, CD and/or DVD cases and pieces as specified by the Library. Vendors should list costs associated with programming the tags separately from the application costs. Music CDs will require a standard 2" square RFID book tag placed on the case and a CD RFID "hub" tag on the disc. For multi-disc sets, only one disc would have an RFID tag. The Library uses the Bibliotheca RFID system.
- c. Application of Library provided barcodes to Audiobook, CD and/or DVD cases and pieces as specified by the Library.

- d. Packaging music CDs and DVDs into One-Time™ Security locking cases purchased by the vendor; cutting/trimming the original packaging literature and inserting it into the clear sleeves of the cases.
- e. Packaging audiobook CDs into non-locking two-ring audiobook cases purchased by the vendor (not Library); cutting/trimming the original cover/packaging information and inserting it into the clear sleeves of the cases.

I. Selection / Ordering Products and Services

Proposers should indicate availability and detailed unit cost for each of the following selection assistance products, enhancements, and services.

1. Vendor operated websites/databases with multiple unique staff account logins and an administrative account with the following capabilities:
 - a. Full bibliographic information including UPC codes for media, and publication and/or street date (formatted mm/dd/yy)
 - b. Current stock information (preferably real-time inventory with quantity given in “on hand” and “on order” amounts)
 - c. List price and discounted net price of items linked to current Library discount schedule
 - d. Full reviews, citations, and cover art to all users
 - e. Functionality to create multi-user "shared carts" for ordering
 - f. Functionality to batch import orders with brief MARC records into the Library's ILS, currently Innovative Interfaces, Inc. Sierra system
 - g. Functionality to enter multiple funds and multiple location codes for an individual title in a grid system
 - h. OCLC number provided with brief MARC download
 - i. ISBN link in vendor database to Library OPAC
 - j. UPC link in vendor databases to Library OPAC (preferred function option)
2. Electronic selection title listings (E-Lists) that provide full bibliographic and order information on current titles (note scope, format, and frequency of each).

J. Vendor participation in the WorldCat Cataloging Partners (WCP) Program.

WCP is an arrangement between OCLC and the vendor in the provision of OCLC MARC records to the library for the materials shipped by the vendor. The basic level of service provides automated copy cataloging to the library by OCLC.

Proposers should indicate whether or not they are partners with OCLC in the provision of this “basic” (as defined by OCLC guidelines) level of service and a detailed explanation of any vendor charges to Milwaukee Public Library for this service. At this time, the program is for “books only” shipped to the Library.

K. Electronic Ordering, Order Confirmations, Status Reports, and Invoicing

The Library currently uses the Sierra Acquisitions and Serials control modules, from Innovative Interfaces. Proposers shall indicate their ability to accept electronic orders and provide electronic invoicing via EDIFACT, and to provide order confirmation information & status reports in an electronic format. Proposers should also indicate the availability of a vendor system that allows library staff to track shipments from warehouse to library dock. The Library would also need to receive both the print and electronic invoices.

VII. Delivery

All deliveries are to be made to the address listed below. **The Library has inside dock delivery ONLY. The inside dock has a 12-foot clearance. No orders will be accepted outside of the dock.** Dock hours are 7:00 a.m. to 3:00 p.m. To arrange delivery vendors must call 414-286-3072.

A. Firm ordered materials for the Milwaukee Public Library shall be delivered to:

Milwaukee Public Library, Acquisitions Section
833 West Wells Street
Milwaukee, WI 53233-2385

B. Continuations materials for the Milwaukee Public Library shall be delivered to:

Milwaukee Public Library, Serials Section
833 West Wells Street
Milwaukee, WI 53233-2385

VIII. Expected Agreement

The successful responder will be expected to enter into an agreement on the form prepared by the City of Milwaukee, which is substantially the same as the Request for Proposal, Scope of Services, and Standard Terms and Conditions. In no event is the responder to submit its own standard terms and conditions as a response to this RFP.

IX. Contract Term

The term of this contract shall be for three (3) years from the award date. The contract may be extended for two (2) additional two (2) year terms upon mutual agreement. Contract continuance is contingent upon funding availability.

X. Declaration of Default

The City of Milwaukee reserves the right to declare in default any contract as a result of the Responder's failure to promptly and effectively carry out the provisions of the contract.