

## **Autosort Working Group Recommendation**

*Approved by the Massachusetts Statewide Delivery Committee on October 16, 2009 (pending funding approval by network boards)*

### **Recommendation to Proceed with an RFP for Statewide Sorting And Delivery Services by Appointing a New, Expanded RFP Task Force**

Dear Massachusetts Statewide Delivery Committee and Stakeholders:

I am writing as convener of the working group charged by the Massachusetts Statewide Delivery Committee with investigating the establishment of a single, automated, central sort for all regions. The Autosort Working Group has completed a significant amount of work. We are asking for your help in the next phase of this project.

The Group was asked to develop a detailed cost/benefit analysis (including costs to networks and libraries) and perform a review of case studies in libraries and industry to help identify successes and pitfalls and use this research to develop a report that examines costs related to a single automated central sort.

At our initial meeting in April 2009, the group agreed that a reasonable goal was to prepare an RFI (Request for Information) to gather the best ideas from potential contractors within six months and to follow that with an RFP (Request for Proposal) to result in a new contract start-up in July 2010.

We issued the RFI in July 2009 and received 17 responses in August 2009 (see below for benefits, issues, and responsibilities). Autosort members reached consensus on September 2, 2009 that we have learned enough from the RFI process to determine that it is possible to accomplish the goal of centralized sorting with some level of automation and that the next step should be an RFP to allow us to do a detailed analysis of costs and benefits to all parties concerned (libraries, networks, regions, and MBLC).

It is imperative that all stakeholders “buy-in” to this planning because of the significant changes in the ways we will do library delivery in the future. We recommend that a new RFP Task Force be created, comprised of representatives from all stakeholders, i.e., Autosort members, libraries, networks, regions, and MBLC. We believe retaining the consultant who assisted us with the RFI will provide significant benefits. We recommend engaging this consultant again and that the cost be shared among the stakeholders in a mutually agreeable way. The total cost will be about \$13,000 (\$812 average for each of the 16 stakeholder organizations).

While Autosort believes that we should capitalize on the momentum generated by the RFI process and strong interest by vendors, the ambitious schedule suggested originally by Autosort seems to be too aggressive for many stakeholders. Stakeholders must agree on a manageable schedule.

Several Autosort members will be available to discuss this recommendation at the October 16th meeting in Boxborough. In the meantime, please let me know if you have any questions.

Sincerely,

Greg Pronevitz,  
on behalf of the Autosort Working Group  
888-326-7772 - greg@nmrls.org

Enclosures:

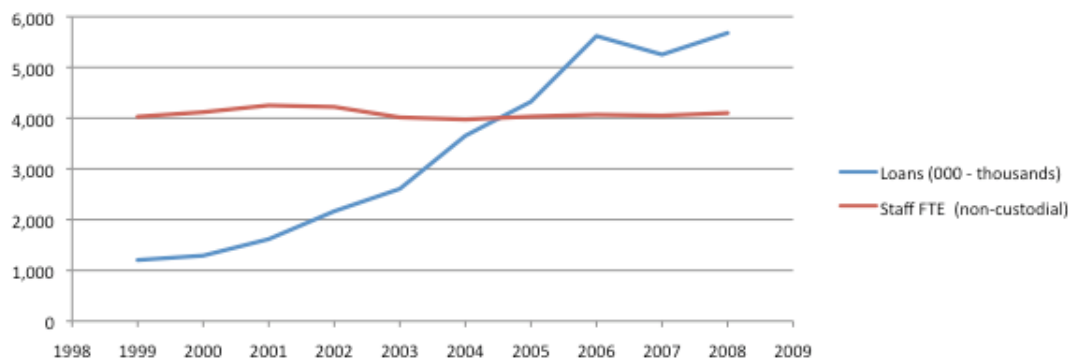
Consultant's Proposal to Work on RFP  
Potential Benefits, Issues, Responsibilities, and Costs

## Potential Benefits:

1. **Eliminate labeling, presorting, bundling effort in libraries**
2. **Delivery to libraries sorted by: branch with potential for sort by returns/holds and other criteria**
3. **Generate and provide system generated hold slips at sort site**
4. **Tote level check in and, perhaps, entire delivery level check in**
5. **Statewide uniformity**

## Issues:

### PL Staffing and Loans Generated by Automated Networks 1997-2008



1. **Sustainability** - Without significant improvements in efficiency, how long can library staff sustain the ongoing growth in delivery volume? Delivery volume (network loans) has increased 500 percent from one million to six million over ten years. Public library annual circulation has increased from 45 to 54 million (20%). Public library FTE staffing has increased 8 percent from 3,800 to 4,101.
2. Compliance with **Barcode Location Policy**
3. Compliance with forthcoming **Packaging Policy**
4. Processing materials for **non-networked libraries**
5. Should we establish **Massachusetts RFID and barcode standards?**

## Responsibilities and Costs:

1. **Network connectivity and data**  
In order to eliminate the library task of placing a delivery label on each outgoing item, the automated or semi-automated sorting system will require the destination data for each item. Some vendors propose a live SIP2 connection while others propose downloading batches for quicker access at the sort site. It may also be useful for the delivery provider to have access to each network for troubleshooting a small number of items. The agreement needs to address privacy needs for library patron information.
2. **Workflow changes at libraries (training needed).**  
Staff members who process incoming and outgoing materials are likely to require training in preparation and processing in the new environment.
3. **New mindset and governance structure for delivery as a statewide service**  
A new governance and policy/standards making system is likely to result to make the transition from six regional delivery service systems to a single statewide project. Other considerations are management, staffing, customer service channels, communications (contact points or point), auditing and payment system, and contracting.
4. **Contracting authority and funding** for this new statewide project. In order to avoid large upfront costs, we hope to establish a long-term contract with meaningful and realistic milestones to spread the costs over a long period.
5. A **retrospective barcode placement system** must be developed and funded.