

Minutes of the Public Meeting with Potential Respondents to Discuss Questions about the MLS Delivery and Sorting RFP

July 29, 2010 Minuteman Library Network, Natick MA

Greg Pronevitz, MLS Executive Director, noted that there were two models for responding to this RFP. Vendors are invited to respond to one or both. Each response should be submitted separately.

Model 1: Delivery and Network Based Sorting

Model 2: Delivery and Label-Based Sorting

All vendors have been assigned numbers. Questions will be taken by vendor number to allow all vendors to pose questions. There are 22 vendors registered. Questions can also be submitted by 4pm, Aug 2 by e-mail. All answers will be posted on the web by Aug 16. RFP due Aug 31 4PM.

(Notes added after the discussions are in blue text.)

There are also vendors via conference call.
There is also a video feed.

Meeting began precisely at 10am.

p. 8 RFP Mandatory Goals. Greg read this aloud.

Greg announced that some vendors have indicated the interest in working with other vendors. If vendors send contact info to rfp@masslibsystem.org it will be posted on our web site at: <http://wp.me/PXRJJ-7c>

Then vendors were asked for their questions in numeric order.

Vendor #2) Do responders need to adhere to current stop times? Can delivery take place around the clock? Answer: Stop times will need to be made in conjunction with the needs of individual libraries. Some libraries are not open all days/times. Efficient routing will help keep costs down, we understand this. Preference for most deliveries is during normal working hours but many libraries are not open during normal working hours.

Vendor #3) Will there be a top-down IT person we will be interfacing with? How will MLS and its partner organizations provide assistance with computer networks? Answer:

Networks do have a tech person that will be the technical contact for the network for issues such as SIP2 connectivity which will be in place with each network.

Vendor #4) There was a discrepancy on the routing for central region and lists will be **updated to address this discrepancy.**

How much presorting is now done in Central Massachusetts?

Answer: There was little formal pre-sorting, no set routine to do so. Most sorting was done by the vendor. Some pre-sorting was done as a courtesy.

Vendor #5) What is the quantity of totes by size? Greg: Please see the last worksheet in Appendix A for quantities. The Consultants Report (appendix E) clarifies size of totes.

Would all of the totes be available to use on this project? Greg: Yes, but we are looking for suggestions from vendors on the best totes for the long term needs of this project.

Vendor#8) Is Woburn determined as the hub? Greg: No. Consultant did mention that Woburn was a possible hub for delivery because it was used by four of the former regions' contractors but we are looking for the best solution from vendors although Woburn is acceptable but it has not been predetermined.

Vendor #9) Is there a long term goal of all libraries moving to one ILS? (Laughter in the room.) Answer: We are all private non-profits and they all have their own ILS. They will be SIP2 compliant.

Vendor #11) Who is responsible to train and educate library staff in new procedures? Greg: MLS and networks will take care of training.

Vendor #18) Can we create our own route system? Can we provide more efficiency by changing it? Greg: We are not locked into the current routing system. More efficiency is important.

Vendor #19) 8.5 RFP Pricing adjustments concerning fuel surcharges. Greg: Certainly fuel charges are a significant part of your costs. We will entertain proposals with fuel increases and decreases. We are looking for an easy way to manage prices.

Vendor #21) Will you post names of handling, transportation, etc providers? If a vendor sends info by e-mail to rfp@masslibsystem.org it will be posted.

We've talked about a single sort site before, but what is desirable in the future? Greg: We are willing to entertain proposals with multiple sort sites. Most of the sorting is now done in Woburn but Central Mass libraries are now sorted in Leominster. Western Mass. materials are now sorted in Whately.

Vendor #22) Libraries have undergone budget cuts,, are we anticipating more budget cuts. Is there a ceiling we can expect on this project? Greg: This is a critical service and we will need to recognize issues that increase costs but we do operate within a budget.

Everyone present registered. So all vendors have numbers. Some vendors did arrive late and were assigned numbers later. Questions will continue in vendor order and vendors may elect to pass.

Vendor 2) Some libraries will not be using barcodes. Will libraries be separating non-barcoded books from those that are barcoded. Some non-networked libraries do not have useful barcodes. Will they be segregating these materials? Greg: These libraries will be the smallest libraries and space in the truck is valuable. (It is implied that a small library of this type would use too many bins and they would be partially empty.)

Follow up) But a busy library will also have non-barcoded items, could a busy library separate those items? Answer: They will be virtual catalog items and will be labeled differently. Greg: We are asking vendors to offer suggestions on dealing with non-networked libraries.

Vendor #3) Are there duplicate barcodes within the system? Greg: No.

Vendor #4) Is the split between holds vs returns a 50/50 split? Susan McAlister (Minuteman) : Items are not necessarily returned from the library from which it is borrowed. Holds could be returned to the owning library to fill another hold by one of their own patrons.

Are the libraries that want holds and returns separated easily identified? Greg suggested that out of about 550 libraries on delivery, if you look at 10 percent, you would have 55 libraries highest volume stops which could be provided with this type of sorting.

Vendor #5) Can you provide info on tracking SLA's (Service Level Agreements)? Could we see current reports on SLA's? Specifically concerning sorting accuracy etc. How is this tracked? Answer: We don't have weekly tracking or reporting on accuracy. Lori: We are looking for better tracking of SLA and better reporting so we can monitor performance.

Accuracy tests were performed about a year ago and were tabulated on one week of service. 99.4% accuracy was what was found, we are now looking for 99.7%. Vendors have said that 99.4% accuracy isn't great. It should be closer to 100% when handwritten slips are eliminated. (Note: 1% of 15 million would be 150,000 missorted items per year would need to be resorted and reshipped twice.)

Vendor #7) Consultant report recommends 15 foot trucks with lift gates. How many libraries did the consultant visit to determine this? Lori: I don't remember exactly how many I visited. The truck should be maneuverable and efficient. It was based on anecdotal evidence. Greg: That study was done a couple years ago. It was a recommendation, not an ironclad rule. A while ago many vendors were using cargo vans and in Eastern Mass that was not practical. The size of the truck is not a requirement of the RFP.

Vendor #8) There was a trade show in Washington DC and one vendor demonstrated a sort-to-light system to eliminate printed transit slips. Greg: It is being used in SAILS. The SAILS system is unable to print useful transit slips. SAILS is currently testing this method but this does not signify a decision about acceptable solutions for this RFP.

Vendor #11) Can retrospective barcoding be handled by the libraries? Answer: Some libraries have been doing this. But not very many at this time. We estimated 50-55 percent of items at SAILS had barcodes on the outside. Greg did an informal tally in the western region and they were at 50% barcoded on the front left according to current recommendations.

Vendor #12) Do you foresee a volume increase of 25% every year? Answer: Hard to tell. Some networks have had steady increase but there is no way to predict.

Vendor #13) SLA tracking? Will vendors have access to data in libraries? Answer: No but give us an example of what you are talking about. Access to individual ILS for SLA's will have to be limited. SIP2 is needed for this and it will be available. Complete ILS access cannot be granted due to patron confidentiality. What is needed from the ILS is routing info, not full access to patron records.

Vendor #18) We are looking at possible partnerships. Do you want a joint proposal or a lead proposal with two vendors –example) transportation and networking. Answer: MLS prefers a single proposal. Info on vendors willing to work together can be posted on the web site.

Vendor #21) Are site drawings available of current sorting facilities? Or maybe site visits? Greg: It is our hope that the vendor will provide the sort site and facility. We have a facility now in Whately that we are willing to discuss leasing to the vendor if it is in your interest (see Appendix F). There are also vans for sorting on-board. There are eight drivers in Whately who might be willing to work for a vendor.

Vendor #24) Is there standardization now on barcodes across the state? Answer: 14 digit barcodes are in place but some schools and others not part of the shared system may use other types. They use manual transit slips anyway, they have no choice. [\(We must point out that some individual libraries and all of the CLAMS libraries use different barcodes. See Appendix C: Network Survey Data \(barcodes tab\)\)](#)

MLS owns the containers and they are available for use. We are looking for recommendations for containers statewide and recommendations on who will pay for them. MLS is now providing all the containers. There was a 9" high tote recommended by the consultant. It is in the consultant's report for the NE region.

Vendor #2) Whately. Space is available for lease in Whately, drivers may be available to work. Vehicles are available for purchase. They have 6 vehicles. Most are 24 foot beds. 24000 gross vehicle weight. UPS style truck. This info is in Appendix F.

Vendor #5) Out of network materials must also be one day turn around? Greg: Our preference is one day turn around but non-networked stops do not always get daily delivery. Also, item count is less than 5% of the total.

Susan McAlister mentioned that Minuteman just got delivery and presented example of a bin for Metrowest which is larger than those recommended by the consultant.

Greg: Cross state delivery now takes place overnight.

Lori: 9 inch and 14 inch totes could be used simultaneously as long as their foot print was the same size. (Please note: the main goal of this RFP is to improve efficiency in libraries. The larger totes are much heavier.)

Vendor #7) Volume is increasing. How will the vendor be protected if a library cuts hours of operation with the same volume of materials for delivery? This would increase the volume but the days open decrease. How is the vendor protected? Greg: We recommend metrics to allow for these issues. Please suggest a solution.

Vendor #11) How will problems be sorted out between libraries and the vendor? Greg: Vendor will handle all day-to-day issues but we do need an escalation contact. Greg: We should work together to discuss a procedure to handle issues, example, a late driver for a flat tire, etc. A library needs to be able to report directly to the vendor and it be handled and addressed in a timely manner. If the issue is not resolved, then MLS should get involved. You will have a tech person in each network to work with. Greg: we use e-mail to communicate now simultaneously. Greg suggests that communications mechanisms be developed so everyone doesn't get info they don't need.

Vendor #17) Is there early morning access to some libraries prior to their opening. Greg: Some libraries do have early morning delivery and those are outlined in Appendix A and I assume those arrangements might continue. It has to be by mutual agreement between library and vendor.

Vendor #18) What are current responsibilities of the libraries' staff for incoming and outgoing materials and with a new RFP are we absolving them of their responsibilities? Answer: Some libraries automatically print a transit slip, some hand write them. We want to eliminate the need for a library to print a delivery slip. Follow up: Destination libraries check in items and if on hold for a patron a hold slip is printed at the receiving library. Answer: These operations will continue.

Vendor #19) CMRLS sorting site has changed from Shrewsbury to Leominster. Equipment at Shrewsbury such as sorting racks might be able to be purchased. (The sorting racks used in Shrewsbury are owned by MLS and would be available for a negotiated price.)

Vendor #20) There will be SIP3. Will ILS be moving to SIP3? Answer: Debby Licensing and costs about SIP3 are not even on the radar yet. SIP2 is what we are using now.

Do drivers have to be employees or can they be independent sub contractors. Our preference is that they be employees. There is a legal discussion now, there is a link to this on the RFP and we suggest you familiarize yourself with this and consult an attorney for legal advice.

Vendor #24) Delivery is very different that the automation issue. Lenders prefer five year leases on equipment. Vendor of some handling systems have significant capital investment. Have you discussed the possibility of leasing equipment to a transportation company? Greg: We've asked vendors to propose terms that work for them. MLS is unable to purchase equipment. We prefer a single source solution.

Will the contract be with the state?

Greg: Your contract will be with MLS, a not for profit, operating under 100% state funding. It is a corporation not the state government, making the contract.

Vendor: In NY state, a similar organization had to be approved by the state attorney general but yours is not. Greg: That is correct. We will consult with our funding agency MBLC ([MBLC representatives are on the RFP Task Force](#)). The state of MA does not guarantee the contract.

Question: Is this why you prefer a shorter contract? Greg: Technologies change and volume is likely to change. 35% of our materials is media and not books. We could see a decline in delivery if downloadable take off. Which is why we prefer a shorter-term contract. ([Note: MLS has not ruled out a longer contract.](#))

Vendor #2) Is there data on how many items need to be barcoded, retrospectively? Greg: We assume that we are shipping about 50,000 items per day. So, 25,000 items for the first evening need barcodes added to the outside of the item. This number will continue to shrink as time goes by because it is mainly newer items that are shipped.

Question: How many new items are acquired by libraries each year? Greg: New items will have an external barcode. Answer: Items with barcodes on the outside have steadily been increasing as new items are the most frequently delivered items and their barcodes are in the proper place on the item.

Vendor #5) What is the process for changing routes? Informing libraries, approval to change the routes? Greg: Routing now is recommended by the vendor due to volume or other issues. 9 times out of 10 MLS checks with the library and issues are worked out. Time of delivery has to be negotiated with the library. Libraries need a predictable schedule but changes do happen when necessary.

Vendor #7) Goal is to eliminate routing slips but on the consultant's report said libraries using printed slips are very happy. Answer: Before we were able to print transit slips automatically they were handwritten or pre-printed, so automated slips speeded up the process and libraries liked the automated printing.

Question: How is the item routed to the patron on the delivery end without a printed slip? They still have to scan every item to print the slip with the patron's name on it.

Answer: That slip with the patron's name on it we are not eliminating, this happens at the receiving library where the hold is picked up.

Vendor #8) Will these questions and answers be available later? Answer: yes.

Vendor #18) Is there a report generated so the vendor will know there is a fluctuation in volume before they pick up the items? Answer: Items are often being placed in bins as the truck pull up the driveway, so there is no report prior to the truck arriving for pick up. But post holiday pick up is usually large, also Monday delivery is usually heavier and volume decreases during the week. Vendors have learned from experience when there are fluctuations. (Note: [MLS and the libraries will attempt to notify vendors of know fluctuations, for example after a period of closure or system down-time. See Appendix A to determine daily fluctuations through our sample week; see Appendix B "Annual Trends" tab for monthly fluctuations](#))

Vendor #23) Where do returned items not required for transit go? Is there are need for central storage? Answer: No. Items not required for transit are shelved in the owning library.

Vendor #24) SLA how do you take into consideration tape over barcodes, etc. How is that factored into the accuracy issue? Greg: We understand those types of problems do happen and non-readable barcodes should be replaced.

Vendor #5) How is the pricing of sorting calculated? In the study sorting costs were as low as one cent per item – how was that calculated? Lori: I relied on data from the regional libraries, which were only estimates. Greg: Between 400-600 items can be manually sorted per hour depending on the efficiency of the sorting operation.

Vendor #7) RE: rubber bands, how are you realistically going to eliminate them? Greg: Libraries use common sense. Some media need rubber bands and they are then used, but they are discouraged in general.

Question: What about oversized items that don't fit into totes. Answer: SAILS makes those items non-requestable. Some packaged electronic equipment is sent through delivery. We never made provisions specifying what could or could not go into delivery. Greg: Some items need special care and provisions should be made or addressed.

Vendor #17) Transfer of money or non-library types of items. Greg: Money is not supposed to be sent into delivery.

As many vendors were passing, Greg reminded everyone that this meeting is the last chance to ask questions in person.

Vendor #24) Where is Mass at with RFID? Answer: Debby: A few libraries are using RFID. At this time it is early in adoption. RFID is not being implemented on a system-wide basis so they still use regular barcodes. RFID is not part of this contract.

Question: Is there a budget in mind for the entire project? Greg: We have a budget and we want your best proposals. We are not, however, prepared to disclose the budget at this point.

Question: What's the next step after the formal proposal on the 31st? Answer: Responses to RFP are due August 31st. Sept. 15 the review of the RFPs begins. Oct and Nov selected respondents' will be invited to make presentations. Jan 2011 site inspections and Jan 2011 a decision on the contractor will be made. Feb 2011 contract negotiations. July 1, 2011 implementation of new statewide sorting and delivery service.

Important: We need your schedule for implementation. We are willing to discuss pre-contract activities to get going earlier. We need to understand the transition from our current system to your system.

Thank you. If you are willing to partner send your contact info and we will post it on our web site.