Request for Information
For Improving Sorting and Delivery Service for the
Six Massachusetts Regional Library Systems

RFI issued by the
Northeast Massachusetts Regional Library System (NMRLS)

NMRLS Document: RFI/2009-07-07

Responses Due: 4:00 pm EDT, August 17, 2009

The Massachusetts Regional Library Systems (MRLS) are requesting information from vendors/potential contractors and/or teams of contractors to provide overnight sorting of library materials (about 13-14 million per year) and pick up and delivery of these materials at member libraries (approximately 537 outlets). MRLS seeks solutions related to all aspects of the daily delivery service including labeling, packaging, pick up, sorting, and transport. This is not a procurement.

Please send to:

MRLS Sorting and Delivery RFI
Northeast Massachusetts Regional Library System
175 Andover Street, Suite 205
Danvers, MA 01923

Electronic submissions should be emailed to greg@nmrls.org, return receipt requested.

1.0 Introduction

1.1 Authority

Northeast Massachusetts Regional Library System

The Northeast Massachusetts Regional Library System (NMRLS) is incorporated as a 501(c)3 not-for-profit corporation. NMRLS is a multitype library cooperative funded through the Massachusetts Board of Library Commissioners. Chapter 78: Section 19C of the General Laws of Massachusetts authorizes the Board of Library Commissioners to "establish a comprehensive, statewide program of regional library service, consisting of regional library systems, which shall not exceed six, for the purpose of providing reference and research services, interlibrary loan, delivery, and other regional services to public, school, academic, and special libraries in the region…."

NMRLS is representing six regional library systems in this endeavor. All six regions expect to benefit from and plan to participate in this procurement, i.e.,

Boston Regional Library System (BRLS)
Boston Public Library
700 Boylston St.
Boston, MA 02117
Office: 617-859-2380
Fax: 617-267-0364
Administrator: Michael Colford

Central Massachusetts Regional Library System (CMRLS)
8 Flagg Road
Shrewsbury, MA 01545-4665
Office: 508-757-4110
Fax: 508-757-4370
Administrator: Carolyn Noah

Metrowest Massachusetts Regional Library System (Metrowest)
135 Beaver St.
Waltham, MA 02452
Office: 781-398-1819
Fax: 781-398-1821
Administrator: Sunny Vandermark

Northeast Massachusetts Regional Library System (NMRLS)
175 Andover Street, Suite 205
Danvers, MA 01923 – 978-762-4433
Office: 978-762-4433
Fax: 978-739-4537
Administrator: Greg Pronevitz

Southeastern Massachusetts Regional Library System (SEMLS)
10 Riverside Dr.
Lakeville, MA 02347
Office: 508-923-3531
Fax: 508-923-3539
Administrator: Cynthia Roach

Western Massachusetts Regional Library System (WMRLS)
Mailing Address: P.O. Box 609
South Deerfield, MA 01373-0609
Street Address: 4 Sandy Lane
Whately, MA
Office: 413- 665-9898
Fax: 413-665-8877
Administrator: John Ramsay

1.2 Other Participants

Massachusetts Board of Library Commissioners
(State Agency that funds the Regional Library Systems)
98 North Washington Street, Suite 401
Boston, MA 02114
617-725-1860
Contact: Paul Kissman

Autosort Group

Charged with the **investigation of establishing of a single, automated, central sort for all regions.** Working group will develop a detailed cost/benefit analysis (including costs to networks and libraries) and will perform a review of case studies in libraries and industry that will help identify successes and pitfalls and use this research to develop a report that examines costs related to a single automated central sort. Convener: Greg Pronevitz (NMLRS).

Shared ILS (Integrated Library System) Networks

Members, links, etc.: http://mblc.state.ma.us/libraries/networks/index.php

System information:

Systems used by BRLS Libraries

Network Name: Metro-Boston Library Network (MBLN)
System software: Horizon
Version: 7.3.4

Network Name: FLO (Fenway Libraries Online)
System software:
Version:

System used by CMRLS and WMRLS Libraries

Network Name: CW/MARS
System software: Innovative Interfaces Millennium
Version:

System used by Metrowest Libraries

Network Name: Minuteman Library Network
System software: Innovative Interfaces Millennium
Version: Release 2007 1.2

Systems used by NMRLS Libraries

Network Name: MVLC (Merrimack Valley Library Consortium)
System software: SirsiDynix Horizon
Version: 7.4.2

Network Name: NOBLE (North of Boston Library Exchange)
System software: Innovative Interfaces Millennium
Version: Release 2006 1.3

Systems Used by SEMLS Libraries

Network Name: CLAMS
System software: Innovative Interfaces Millennium
Version: Release 2007 v1.2

Network Name: OCLN
System software: Unicorn Symphony
Version: 3.2.1 (Planning an upgrade to 3.3 in August 2009)

Network Name: SAILS
System software: SirsiDynix Symphony
Version: V. 3.2.1.05

A statewide system for schools and special libraries that is not fully involved in delivery at this point is MassCat. This system might grow to include more delivery participants.

Network Name: MassCat
System software: Koha
Version: 3.01.00.014

Responses to a survey of the Shared ILS Networks in June 2009 about the use of SIP2 for determining delivery destinations. SIP2 is part of NISO Standard: NCIP (Z39.83). See http://www.niso.org.

1. Does your ILS have a SIP2 server we can connect to for sorting items?

Yes. However, one network uses Patron API.

2. Does your vendor support SIP2 messages that will allow us to sort to the branch and bookmobile level?

Most yes. One checking

3. Is there a charge for us to connect to your SIP2 server? If so, what would you estimate?

Sometimes for licensing, configuration, and set up.

4. Describe any bandwidth and/or firewall issues we need to take into account.

Most ILS networks are comfortable with SIP2 connections. At least one network will need to upgrade. Firewall adjustments will be required.

5. Are there other issues we should consider as we look toward using a SIP2 connection with your ILS and other ILS's to determine the destination of items for delivery to Massachusetts libraries?

Back up plan in place in case the SIP2 server goes down or the data connection goes down. What are the workarounds? How will it affect scheduling of pick up by drivers, etc?

Privacy and appropriate use of network and patron data must be preserved.

For support and configuration issues, it would be best if the chosen vendor were a Technology Partner of our ILS provider.

1.3 RFI Objectives

The purpose of this Request for Information (RFI) is to gather information from transportation, logistics and materials handling specialists for the purpose of guiding the Autosort Group in developing a solution to the challenges associated with sorting and delivery of library material between Massachusetts libraries. The RFI process is being used to canvas relevant industry segments for the purpose of soliciting assistance in identifying potential solutions.

The RFI process will help determine next steps for the Autosort Group which may include a competitive think tank to bring compatible contractors together to develop ideas for a joint solution and will include the issuing of at least one Request For Proposals (RFP). The RFI responses will influence the way any subsequent RFPs are constructed.

1.4 Goals

The overall goal of this RFI is to identify ways to reduce costs, save staff time, and increase service quality of the interlibrary delivery service provided to Massachusetts libraries.

Specific goals that have been identified include:

- Eliminate the need for libraries to label outgoing materials for participants in shared ILS's (Integrated Library Systems)
- Find a suitable workaround for non-automated libraries (not part of an existing ILS)
- Eliminate all packaging requirements (with few exceptions)
- Eliminate presorting and bundling of outgoing items from libraries
- Provide deliveries to libraries sorted by branch/bookmobile
- Provide deliveries to larger libraries sorted by items on hold for a patron and items for shelving
- Allow batch check in (tote or delivery manifest)
- Allow online reporting
- 24 hour turn-around for all libraries receiving daily service
- 99.5 percent sorting accuracy (current accuracy 99.39 with hand sorting in one region)
- 99.9 percent correct tote delivery accuracy (currently 99.76 in one region)
- Improve efficiency in libraries
- Improve ergonomics in libraries

2.0 Information Being Requested

2.1 Summary of this RFI

The Request for Information contains detailed information about the interlibrary delivery

services operating throughout the state of Massachusetts. In order to understand the challenges faced by libraries, it is important to understand the details: including how the software is used to make and track requests, how individual library items are identified, how the material moves between libraries, the work associated with labeling and sorting, costs of each component, accuracy and turnaround time requirements, volume of material, delivery locations, and expectations about how the demands of the service are likely to change in the future.

Once the current operation is understood, it may be possible to apply industry standard practices to library delivery needs. Our hope is that there are better solutions available for reducing costs, saving the time of the library staff, improving accuracy and shortening turnaround time. This RFI seeks ideas from the logistics, warehouse, automation, transportation, materials handling, robotics, and any other industry partners that might have unique solutions to the unique set of problems associated with managing interlibrary delivery.

2.2 Background

Delivery and sorting service is provided to support the Massachusetts interlibrary loan programs. Through this program, member libraries loan and return library materials. 537 libraries take advantage of the interlibrary delivery services. It is likely that the number of libraries participating in interlibrary delivery will continue to slowly grow. The total number of libraries is about 1,880.

Most of the participating libraries receive daily delivery. For current routing and volume details, see Appendix A.

The regions spend approximately $2.3 million dollars per year on interlibrary delivery. This service includes pick up of library material in totes which are taken to one of five sorting locations. Some totes are pre-sorted, which means all items in the tote can be delivered to a single destination without sorting. Other totes require sorting. MRLS libraries estimate that approximately $479,000 are spent on sorting (approximately 18% of all expenditures). See Table A: Summary of Delivery Services for more information on volume and costs. The budget figures in this chart includes appoximately $400,000 in internal regional library system costs that are not contracted to vendors. Numerous regional personnel and resources support the delivery program.

Table A: Summary of Delivery Services

Region	Progam Budget for Delivery for 2008	Amount of Delivery Budget for Sorting Services	Number of Locations	Number of Stops Per Year	Number of Items Delivered per year	Size of Service Area (sq miles)	Cost per Item	Cost per Stop	Cost per Location
CMRLS	$285,859	$45,000	97	17,836	1,602,120	1513	$ 0.18	$16.03	$2,947
WMRLS	$405,234		132	15,184	1,578,772	2800	$ 0.26	$26.69	$3,070
SEMLS	$871,439	$110,000	156	35,000	3,231,020	2882	$ 0.27	$24.90	$5,586
NMRLS	$529,000	$151,000	72	16,588	2,444,000	977	$ 0.22	$31.89	$7,347
MMRLS	$573,450	$161,150	57	13,572	3,340,584	476	$ 0.17	$42.25	$10,061
BRLS	$76,284	$11,253	23	5,876	312,656	96.5	$ 0.24	$12.98	$3,317
Total/Avgs	$2,741,266	$478,403	537	104,056	12,509,152	8744.5	$ 0.22	$26.34	$5,105

* MMRLS=Metrowest

Because of the nature of the software used to request material, most of the deliveries move between libraries sharing the same automated network. Each network is responsible for the shared library system software that is used to make the interlibrary request and for this reason, the bulk of the material moves from libraries within the same network. Each region is comprised of one or more such networks. In one case, a single automated network (C/W MARS) provides service to two regions (CMRLS and WMRLS). As a result of the automated network configurations, most of the materials that require delivery remains within the network (approximately 90%). Each region operates its own delivery service. Because of the way the material moves within each network, the regional delivery providers tend to sort each networks' material separately.

Table B: Summary of Each Region's Sorting, Delivery and Network Components

Region	Sorting/Delivery	Automated Network
BRLS	Sorting and delivery handled by courier for delivery. Material shipped between branches of the Boston Public Library are not within the scope of this RFI.	Two networks: FLO (Fenway Libraries Online) and Metro-Boston Library Network (MBLC)
CMRLS	Sorting done in house at CMRLS HQ; contract with courier for delivery	part of the C/W MARS network
WMRLS	Sorting done in house at WMRLS HQ; delivery handled in house also	part of the C/W MARS network
SEMLS	Contract for sorting and delivery	Three networks: OCLN, CLAMS, SAILS
NMRLS	Metrowest and NMRLS contract with the same service for sorting and delivery	Two networks: NOBLE, MVLC
Metrowest	Metrowest and NMRLS contract with the same service for sorting and delivery	One network: Minuteman

In addition to the interlibrary delivery requests made by libraries within the same automated network, a small percentage of other requests are made to libraries outside of the network and/or outside of the region. The software facilitating these requests is MassCat (Massachusetts Catalog). MassCat is also used by libraries without an automated system or which are not part of the one of the networks. Currently, cross-regional requests account for less than 5% of the interlibrary deliveries. Sorting and delivery of cross-regional material is handled by a separate courier service.

One of the most vexing aspects of interlibrary delivery is labeling and sorting. As mentioned above, the software used for making requests of material is the shared network software. Currently, there are nine separate automated network systems involved in interlibrary delivery (See list above in 1.2, other participants). The network software utilizes a bar code number for identifying each item requested. Bar codes are generally found on the outside of each CD, DVD, book or multi-part set (but not always). Library staff use the software to identify and track the movement of the material. In some cases,

the software is configured to print a routing slip. In other cases, the library staff must append a pre-printed or hand-written routing slip to the items. This is very time consuming.

The routing labels are used by the sorting personnel to sort individual items into totes which are then delivered to the libraries. The labels usually indicate whether the item is being returned to the owning library (returns) or is being provided to fill a request (holds).

In an effort to reduce costs and optimize the delivery service, the regional systems contracted with a consultant to evaluate all aspects of the sorting, delivery and in-library operations associated with interlibrary materials movement. The Consultant's Report is available as Appendix B. Reading the Consultant's Report is strongly recommended. Important details about the current operation are included in the report. The Consultant's Report also includes recommendations which will provide respondents with details about some of the solutions being considered.

2.3 Issue Areas

In this section, we provide additional detail about particular aspects of the interlibrary delivery services that pose unique problems. The goal is to find solutions that address each of these issue areas.

2.3.1. Transportation Issues

A map showing delivery stops in each region, network affiliation (color-coded) of each stop (if applicable), address, expected number of items delivered per day, expected number of items shipped out per day and distance from Woburn is available for each region on Google Maps:

BRLS

http://maps.google.com/maps/ms?ie=UTF8&hl=en&msa=0&msid=103195923948344435907.000454324e118c75850d6&z=10

CMRLS

http://maps.google.com/maps/ms?ie=UTF8&hl=en&msa=0&msid=103195923948344435907.00045456ba17207136028&ll=41.724181,70.683289&spn=1.266853,1.908875&z=9

Metrowest

http://maps.google.com/maps/ms?ie=UTF8&hl=en&msa=0&msid=103195923948344435907.00045456dc2097196ff45&z=10

NMRLS

http://maps.google.com/maps/ms?ie=UTF8&hl=en&msa=0&msid=103195923948344435907.00045432b60cda1bb1648&z=10

SEMLS

http://maps.google.com/maps/ms?ie=UTF8&hl=en&msa=0&msid=103195923948344435907.0004545c4c8e645f5cd2b&ll=41.793952,70.649065&spn=1.265478,1.908875&z=9

WMRLS

http://maps.google.com/maps/ms?ie=UTF8&hl=en&msa=0&msid=103195923948344435907.0004545699d668995f2b7&z=9

In one region (WMRLS), the delivery service is handled in-house with customized trucks owned by the region. Sorting is mostly done on the trucks along the route and the rest is done at the WMRLS HQ (indicated by a yellow push pin in the above WMRLS map). While sorting on the trucks is not generally considered an optimal solution, there may be some benefit to the approach because of the relatively light volume of material handled at each location, the condition of the roads (many are rural, dirt roads) and the distance between libraries. See Consultant's Report (Appendix B) for more information.

One idea being considered is establishing a long haul route between WMRLS headquarters where sorting is currently performed. This way the trucks and delivery/sorting staff could be retained. We seek recommendations associated with this approach and welcome any alternative ideas.

In the Consultant's Report, Woburn was suggested as a prime location for locating a central sorting facility. As such, the Google Maps provide the distance from each delivery location to Woburn (all locations are under 175 miles from Woburn). This is not required and respondents are encouraged to comment on the suitability of Woburn as a central sort location versus using a more distributed solution to sorting the material.

2.3.2.a Labeling

The Consultant's Report provides details about the different labeling procedures in place in each region. While there is a standard template in use statewide, the degree to which the labels are automatically generated versus manually coded depends on the network.

Ideally, the work of labeling individual items for routing purposes would be completely

eliminated. To do so would require that sorting is accomplished by reading the unique identifier off the individual item and accessing the appropriate network system's software to determine the destination location.

Providing such a solution requires the delivery/sorting vendor to make a real-time connection to each of the network servers (C/W MARS, OCLN, CLAMS, SAILS, NOBLE, MVLC, Minuteman, FLO, MBLN and Boston Public Library) and making use of the SIP2 protocol (information on the SIP2 protocol is available at http://www.aneg-dv.de/allegro/sip2/sip2_developers_guide.pdf) to determine the location (library and branch) to which the item should be delivered. The SIP2 protocol can also be utilized to determine whether the item is being returned to the owning library or being provided to fill a hold by a requesting library.

Currently, the unique identifier on each individual library item is a bar code label. Not all bar codes are readily viewable (e.g. on the outside of the item) so some retrospective bar code labeling is likely to be required to offer this solution.

RFID tagging is increasingly popular in libraries as an alternative (or supplement) to bar codes. RFID tags make it easier for library staff to perform circulation and materials handling functions and easier for customers to use the self-service check in and check out systems. The tags could also be used to eliminate the use of routing labels and for creating additional tracking opportunities as delivery material moves around the system. For these reasons, solutions are sought which include RFID tagging the material.

Whatever solution is recommended (bar codes, RFID tags, or an alternative system), it will be necessary for the conversion to occur at the sort center. It may also be required to operate a hybrid system (e.g. bar codes on some libraries' material and RFID tags on others). A handful of libraries are currently using RFID. The vast majority of libraries use bar codes. Beginning in March 2009 bar codes for new items are being placed on the top front left of the cover. The goal is to handle the tagging process at the sort facility as material moves in and out of the sort center rather than taking on a library-by-library conversion process.

Note that all approaches will very likely require that some items be trapped during sorting so that an external bar code and/or RFID tag can be affixed to the item.

2.3.2.b Packaging

Some of the library material being delivered is more likely to be damaged than others. Books are almost never packaged by libraries but sometimes CDs and DVDs are protected with some kind of packaging or bundling. Wrapping a rubberband around five CDs, or placing a CD in a jiffy bag, and even placing a rubberband around a book requires additional staff time and creates ergonomic challenges. Solutions which eliminate the need for any kind of packaging, bundling, or rubber-banding of delivery material while ensuring that the material is not damaged during sorting and delivery are strongly encouraged.

2.3.3. Library Receiving Process

Material is currently transported in totes. Library staff must remove incoming items from the delivery totes and sort them into book carts for distribution throughout the library. Sometimes items delivered to one library must be distributed among that library system's branches. Working with the current totes is awkward, takes up too much space, and is time-consuming. Any solutions that would optimize the process of unpacking totes, or using some kind of tote that could be used to distribute material throughout the library (without unpacking to book carts), or presorting material into totes (e.g. children's picture books, popular DVDs, Branch A returns) are welcome. A primary goal is to reduce the delivery-related workload of library staff.

The library software used by virtually all libraries requires staff to scan the bar code of incoming material. This "checks in" the material to the receiving library. This RFI seeks suggestions for ways to eliminate this step or at least to create the ability to check-in material in batches via some kind of tote or delivery manifest.

Material that is sent to a library to fill a hold requires the receiving library to generate a Holds Slip. Many libraries have this material behind the circulation desk and pull it for library customers. However, some libraries shelve the Holds publicly so that customers can pull the items for themselves. Items are placed on the shelve with a Holds Slip inside the item. The Holds Slip has the name of the customer or a specified code identifying the customer on it. Items shelved in alphabetical order by customer name. This self service model is likely to spread because libraries are short-staffed and seeking more self service options. Customers also prefer to self-serve as much as possible.

Some of the networks have automated the printing of Holds Slip upon receiving the item. An even better solution would be to have the Hold Slip placed on the item automatically during the sorting process so that this step could be removed from library staff. Solutions for automating the placement of Holds Slips (or some other alternative to labeling items filling such holds) are strongly encouraged.

2.3.4 Library Access, Delivery Time and Delivery Frequency

Many of the libraries require that deliveries be made only during open hours. This creates challenges when setting delivery schedules because windows for delivery are short at some locations. It also makes it more likely that delivery vehicles will have more traffic to deal with. Some libraries allow lobby access during closed hours. Most libraries receive weekday delivery but not weekend delivery. Holiday weekends are always problematic due to the high volume of online requests that come in (customers can request material 24/7, 365 days a year regardless of each library's open hours).

Library staffing schedules are coordinated with delivery times. Staff are scheduled for processing incoming material so that it can be quickly moved out of totes and onto the library shelves. Most libraries have very little workspace to spare so it is important to

quickly get the material out of the back rooms. It is also important to provide quick turnaround for library customers who expect materials to be available for pick-up within 24 hours of the item being sent from another library.

Ideas for maintaining quick turnaround times (24 hours or better) while reducing the volume of material that is delivered at any one time while taking into account library staffing needs are strongly encouraged.

2.3.5 Sorting Issues

One region does its own sorting in-house and uses couriers only for delivery. Other regions contract with a vendor to do sorting and delivery. Recent assessments indicate that sorting accuracy is very good (99.39% with item sorting and 99.5 tote delivery accuracy).

Item level sorting is done in a variety of ways depending on the region. Delivery tote labeling is also done differently in each region. Please see the Consultant's Report for detailed descriptions of each region's sorting and labeling practices. Appendix C of the Consultant's Report includes images of all the routing labels used statewide.

The goal is reach 99.5% accuracy for item level sorting and 99.9% accuacy for tote delivery while eliminating or significantly reducing the workload associated with the various routing labels in use around the state.

2.3.6 Pricing Issues

The combined cost of the delivery service (all regions) is estimated at $2.3 million annually (excluding internal regional costs). The solutions provided must demonstrate cost effectiveness over time while improving service quality, reducing the workload, and improving ergonomics for library staff.

2.3.7 Future Volume

Rather than reducing the demand for library material, the Internet has created opportunities for increasing resource-sharing between libraries and increasing service level expectations of library users. Customers expect it to be easy to discover and request material (from anywhere) and they expect to be able to have it delivered promptly. These demands continue to put pressure on libraries to make improvements in their software and interlibrary delivery services.

Interlibrary delivery volume has risen steadily over the last several years as libraries respond to the demands with easier-to-use software and more efficient services. This steady increase is expected to continue over the next several years (at least). The regions expect to see at least a 5% increase in volume annually over the next 5 years.

2.3.8 Future Changes in Materials Movement

As noted earlier, the automated network software currently in use creates a pattern of materials movement that is network centric; material generally moves between libraries that are part of the same automated network. New software is being developed that makes resource-sharing outside of the current networks more likely. As a result, sorting solutions that cannot be modified to account for dramatically different patterns of materials movement around the state are not suitable.

2.4 Summary of Additional Information Available in Appendices:

Appendix A: March 2009 Delivery Volume Sample Data:
http://www.nmrls.org/msdc/rfi/2009-regional-delivery-samples.xls
Describes the volume of pick up and delivery at each stop during a sample week in March/April 2009. This time period is typically one of the heaviest volume periods of the year. The names and addresses of all current stops are listed here.

According to recent samples items in delivery are comprised of the following material types:

65% Books
10% CD's
18% DVD's
7% Misc. and other

Appendix B: Consultant's Report at: http://www.nmrls.org/msdc/consultants-report.pdf

Appendix C: Library Branches and Bookmobiles at:
http://www.nmrls.org/msdc/rfi/library-branches-bookmobiles.xls
Not all branch locations or bookmobiles receive delivery at their own location. However, in the automated environment, it would improve efficiency if items for delivery to these locations were packaged separately.

3.0 Instructions for Responding to this RFI

3.1. Who May Respond

Responses are welcome from potential vendors or service providers, entrepreneurs, library staff, or other interested parties with ideas for optimizing the operation, reducing costs, saving the time of library workers, improving working conditions (ergonomics and safety) of library workers, and/or improving the quality of the interlibrary service as described in this document and in the Consultant's Report.

3.2. How to Respond

Responses can be formatted as documents, presentations, audiovideo presentations, or

any other format that respondents feel would best convey the concept they are proposing. It is not necessary to provide solutions to all aspects of this RFI. An emailed cover letter is also required (see 3.4 RFI Response Format).

Deadline: Responses to this RFI must be received at NMRLS no later than 4:00 PM EDT on **AUGUST 17, 2009.**

Please send to:

Automated Sorting and Delivery RFI
Northeast Massachusetts Regional Library System
175 Andover Street, Suite 205
Danvers, MA 01923

Electronic submissions should be emailed to greg@nmrls.org

Other communication regarding this RFI should be sent to the contacts listed in paragraph 3.8.

3.3. RFI Response Contact

Companies responding to this RFI shall designate a single contact within that company for receipt of all subsequent information regarding this RFI and the forthcoming series of RFPs.

3.4. Format of RFI Responses

The following guidelines are offered to assist in the development of your response. You should include a cover letter and the response itself. The cover letter must be emailed (and received) by the deadline.

The cover letter should include the following:

- a statement indicating you have read the RFI and Consultant's Report (if applicable) and understand the issues being address
- an executive summary describing your solution(s)
- the areas to which you are responding and/or what problems you are solving with your proposed solution
- the format of your submission (e.g. Word or PPT document and/or electronic file, videotaped or live presentation [see Section 4.3 RFI Response Presentations and Demonstrations], audiovideo presentation [electronic or other format], etc). and how you will be delivering it to NMRLS
- indicate whether your solution will save money, increase service quality, or reduce staff workload

You may email, mail, or deliver your response. It must be received by the deadline.

3.5. Distribution of RFI Responses

Copies of all material submitted in response to this RFI will be available to all members of the Autosort Group for review purposes.

3.6 Reimbursement

NMRLS will not reimburse submitters for any costs in conjunction with their responses to this RFI.

3.7 Questions Regarding this RFI

Any questions regarding this RFI should be sent in writing by July 27, 2009 to:

Gregory Pronevitz
Northern Massachusetts Regional Library System (NMRLS)
175 Andover Street, Suite 205
Danvers, MA 01923

Phone: (978) 762-4433 x15
Email: greg@nmrls.org (preferred)

You must include full contact information with your question. This information will not be shared with other potential respondents, however, if your question(s) might be of interest to other potential respondents, we reserve the right to post the question and response our our web site and we are likely to do so. These answers will be posted at http://www.nmrls.org/msdc

4.0 Response Review Process and Schedule

4.1 Review Process

This RFI is issued with the intent to gather innovative ideas from relevant industries as well as other interested parties. The information gathered through this process will be used to develop one or more RFPs. The regional library systems, specifically the Autosort Group will review responses to this RFI. In addition, the Autosort Group may invite some respondents (and possibly others) to participate in a competitive think tank in advance of preparing the RFP(s).

4.2 Clarification

To fully comprehend the information contained within a response to this RFI, the reviewing group may seek further clarification on that response. This clarification may be requested in the form of brief verbal communication by telephone; written

communication; electronic communication; or a presentation of the response to a meeting of the Autosort Group.

4.3 RFI Response Presentations and Demonstrations

RFI Respondents may be invited to present their response to the Autosort Group. The purpose of this presentation would be to seek clarification of information contained within the response (as noted above); to further explore issues raised; or to further meet the goals of the RFI.

In addition, respondents may believe that a demonstration to the Autosort Group would prove useful to support the RFI response. If desired, please coordinate with the Contact cited in paragraph 3.8.

4.4 Schedule

The schedule for responding to this RFI is as follows. Please note that early responses are encouraged.

RFI issued: July 7, 2009
Written questions due: July 27, 2009
RFI responses due: August 17, 2009
Review of RFI responses: Begins August 21, 2009