

36

Sacramento Public Library
7000 Franklin Blvd., Suite 540
Sacramento, California 95823
(916) 440-5926

APPROVED
BY THE CITY COUNCIL

JUL 20 1983

OFFICE OF THE
CITY CLERK

July 21, 1983

CITY MANAGER'S OFFICE
RECEIVED
JUL 21 1983

City Council
Sacramento, California

Honorable Members in Session:

SUBJECT: REQUEST TO ADOPT SPECIFICATIONS FOR AN AUTOMATED LIBRARY CIRCULATION SYSTEM AND APPROVE THE REQUEST FOR PROPOSAL TO BE SENT OUT FOR BIDS TO BE RECEIVED FROM VENDORS ON AUGUST 26, 1983.

BACKGROUND INFORMATION

The Library's present manual circulation system is not effective for a library with the high volume of business that Sacramento Public Library has nor for a library with so many and such dispersed outlets. Problems encountered in using the present system include: difficulty in identifying delinquent borrowers, unsatisfied patrons, difficulty in maintaining obsolete equipment, high cost of being the only function for which certain County data processing equipment is used, repetitive handling of numerous manual files, an overdue process which is labor intensive and inconclusive, poor information about the circulation function itself, and lack of management information about materials owned, used, or lost,

PROPOSED SYSTEM

The proposed automated circulation system will replace the current manual overdue system and centralize patron registration. It will also provide daily information on the current status of our collection, on library use by the community, and on demand, fill rate, and purchase needs for specific materials. With a centralized and current patron file, the Library will have better data concerning patrons who chronically owe large fines or who neglect to return materials borrowed.

The automated circulation system will operate in a manner similar to certain retail sales establishments. Each book will be individually marked and its description stored in a computer. Each patron will be individually identified, and certain patron information will be stored in the computer. Computer terminals, located in each library outlet, will automatically link the items borrowed with the patron borrowing, and will automatically break the link when

30
materials are returned. Materials not returned can be readily identified, as can patrons who neglect to return items.

A major project necessary for installing a circulation system was accomplished some years ago when the library converted its card catalog to a machine-readable database. A description of each title is stored in a computer and maintained on a daily basis. It now remains for the library to label each book with an item-specific number and to issue new borrowers' cards with individual ID numbers.

Ultimately it is expected that the on-line circulation system will expand into an on-line catalog, which will allow patrons to search computer terminals for wanted materials much as they presently search the microfilm catalogs. Both hardware and software for library circulation systems are available from several vendors and can be purchased as turnkey packages. Generally some tailoring of the software is done to accommodate a library's specifications, but the costs for developing a totally new design can be avoided.

An automated circulation system would include the following functions:

1. Checkout: When a book is checked out to a patron, the patron's records can automatically be reviewed for fines owed, items lost, and an expired borrower's card. The patron record can be updated on-the-spot upon settlement of the delinquency. This affords the library a control it has long needed, in that borrower registration would be centralized and all branches would know at all times the status of any patron's borrowing record.

2. Check-in: When a book is returned to the library it can be checked in immediately and the patron's record purged for that item. Any overdue fine can be assessed immediately. If the item returned belongs to another branch, or should be held for another patron's reserve, a message is automatically produced.

3. Renewal: Renewals may be handled instantly, either over the phone, or in person. The system automatically alerts staff if the item in question is already on reserve for another patron or if the original patron has overdue fines which should be cleared before renewal.

4. Reserves: Reserves on any title are recorded on the system, and any available copy of that title throughout the library can be immediately located and routed to the patron. If no copy is available, the patron is automatically placed on a waiting list for the first copy which becomes available, regardless of which branch owns it.

5. Patron notices: Cumulative totals of overdues fines, lists of overdue materials, lists of delinquent patrons, and overdues notices themselves, can be automatically produced.

6. Inventory control: Because any title in the library system can be located at any given moment, the possibilities of inventory control will be present for the first time at Sacramento Public Library.

7. Patron Registration: A centralized file of patrons will be maintained. Each time a new card is issued or an old card renewed, the patron's file will be checked for fines owed, material overdue, and change of address. This will preclude the possibility of patrons re-registering at different branches and causing separate files to be maintained to record unpaid fines, overdue materials, and lost cards for the same patrons at several different branches.

Once an automated circulation system is in place and working effectively, several further enhancements to library service will become possible. An on-line catalog of materials, always current, can be produced. Patron access to order files can be arranged, with the possibility of placing reserves on titles not yet received by the library. Repeated patron requests for any title can automatically signal a need to order the title in sufficient quantity to meet demand.

As libraries throughout the state install automated circulation systems, a cooperative effort to share access to these systems will allow more and more interlibrary sharing of library resources and avoid the costly duplication of expensive materials.

FINANCIAL DATA

The Library has estimated costs for the System to be \$980,664. The City's share of the cost would be \$ 433,506; the County's would be \$ 547,158. Actual costs will be known when a vendor has been chosen.

The City has indicated its intention of funding the Circulation System through the Certificate of Participation moneys which have been earmarked for capital improvement projects. The County has indicated its intention of paying the City for its share of the system as identified by the Library.

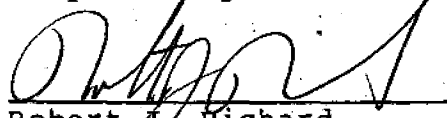
In order to insure use of the Certificate of Participation funding for this project, a vendor must be selected by early September. After this selection, negotiations will take place with the vendor to arrive at a contract agreeable to both City and County. An agreement will be made between the City and the County so that each jurisdiction will pay for its share of the system.

RECOMMENDATION


36

It is, therefore, the recommendation of the Library Department that the City Council adopt the specifications for the Automated Circulation System as set forth in the Request for Proposal and approve the sending of this Request for Proposal to vendors, with bids to be received by August 26, 1983. A copy of the Request for Proposal is available for review in the office of the City Clerk.

Respectfully Submitted,


Robert J. Richard
Library Director

Recommendation Approved:


Walter J. Slips
City Manager

July 26, 1983
All Districts

RESOLUTION NO. 83-595

ADOPTED BY THE SACRAMENTO CITY COUNCIL ON DATE OF

RESOLUTION TO ADOPT THE SPECIFICATIONS FOR AN
AUTOMATED LIBRARY CIRCULATION SYSTEM AND APPROVE
THE REQUEST TO ISSUE A REQUEST FOR PROPOSAL TO
VENDORS

BE IT RESOLVED BY THE COUNCIL OF THE CITY OF SACRAMENTO:

1. That the specifications for an Automated Library Circulation System as outlined in the Request for proposal be adopted; and
2. That the Request for Proposal be issued to vendors with bids to be due on August 26, 1983.

MAYOR

ATTEST:

CITY CLERK

APPROVED
BY THE CITY COUNCIL
JUL 26 1983
OFFICE OF THE
CITY CLERK

Sacramento Public Library
7000 Franklin Blvd., Suite 540
Sacramento, California 95823
(916) 440-5926

TO: Automated Circulation System Vendors
FROM: Lois E. Shumaker - Deputy Library Director
for Automation and Technical Services
RE: Request for Proposal
DATE: July 29, 1983

The Sacramento Public Library is pleased to issue this Request for Proposal for an Automated Library System. We regret that the time-line for Proposals is so short but financial necessities have dictated that we move rapidly to identify a vendor and identify project costs.

Occasionally, when a Request for Proposal is issued with a short time-line, a vendor may make the assumption that another vendor has already been selected and that the RFP process is simply "pro-forma". This is definitely not the case with the Sacramento Request for Proposal. All vendors are encouraged to submit proposals and all proposals will be evaluated under the conditions as outlined in the Request for Proposal.

The short time-line also means that we will not be able to do many of the things we would like to do in selecting a vendor. These include site visits and a vendor's conference. Normally these are done prior to the award of a vendor selection and it can only be hoped that a good selection can be made without these "tests". We will expect to conduct extensive telephone conversations with current user sites prior to the selection.

The demanding time table has meant that we have prepared this proposal rapidly. We anticipate resolving discrepancies during the contract negotiation phase.

The procedure for seeking clarification in the Request for Proposal is included in Part 1 - Terms and Conditions. Please follow this and all other procedures.

We look forward to receipt of your Proposal.

Sincerely,



Lois E. Shumaker
Deputy Library Director for Automation
and Technical Services

For Automated Translation System
10000 East 7th Avenue, Suite 2000
Denver, Colorado 80231
The Department of Public Safety
March 17, 1987

The attached bid is being issued to issue this bid for a contract for an Automated Translation System. As you can see, the time-line for proposals is so short that it is necessary to request that you have ready to identify a vendor and submit a proposal.

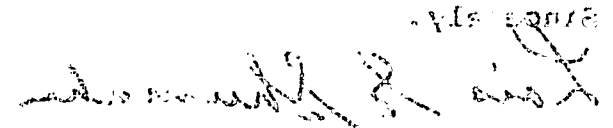
Occasionally, a vendor may wish to submit a proposal with a short time-line, a vendor may wish to submit a proposal that the vendor has already been selected and that the RFP process is simply a formality. In this case, the vendor will not be able to submit a proposal. All vendors are encouraged to submit proposals and all proposals will be evaluated under the conditions outlined in the Request for Proposal.

The short time line also means that we will not be able to do many of the things we would like to do in selecting a vendor. These things include the ability to have a vendor's proposal reviewed prior to the award of a contract. Ideally, there are two ways to do this. A good selection can be made with the help of these "assistants" and will assist to conduct extensive telephone conversations with vendors prior to the selection.

The bidding time line was meant that we have prepared this proposal. The assistance involving development during the contract negotiation phase.

The procedure for a bid of translation in the future for proposals is included in Part 1 - Terms and Conditions. Please follow this and all other procedures.

We look forward to receipt of your proposal.

Sincerely,

Lois M. Starnes
Deputy Director for Acquisition
and Contract Services