



PUBLIC LIBRARY

February 28, 2025

TO: Prospective Contractors
FROM: Pamela Kource, Division Manager for Collection Development
RE: RFP #25-29-LB Cataloging and Metadata Services

Cumberland County is soliciting proposals for a Cataloging and Metadata Services vendor to provide MARC records for our catalog. The Cumberland County Public Library (CCPL hereafter) serves a population of over 332,000 people. It is one of North Carolina's major metropolitan library systems with a materials collection of approximately 437,000 books, bound periodicals, audiovisual items and technology. The CCPL creates catalog records for an estimated 4,000-4,500 titles annually.

Specifications – See Below

Proposals will be received in the Library Technical Services Department, 300 Maiden Ln, Fayetteville, NC 28301-5032 at any time **before 5:00 P.M.**, as per the clock located in the Library Technical Services Department office, **Monday, March 31, 2025**. Clearly mark each package with vendor name and RFP number. Proposals may also be submitted by email to Pamela Kource at pkource@cumberlandcountync.gov, subject line MUST read "**RFP #25-29-LB Cataloging and Metadata Services**". It is the sole responsibility of the vendor to ensure that the proposal reaches the destinations listed above by the designated time and hour. If submitting by e-mail, it is recommended that vendors obtain confirmation that e-mail was received. Proposals received after the specified date and time will be deemed non-responsive and cannot be considered for award. **Important Note: The Execution of Proposal (Attachment A) and all other required forms must be completed, signed and submitted with proposals.**

Should additional information be necessary to prepare a proposal, written questions via e-mail relating to such information may be submitted to Pamela Kource at pkource@cumberlandcountync.gov **no later than 5:00 P.M., Friday, March 14, 2025**. Written questions and responses will be shared with all prospective vendors. Vendors shall rely *only* on written material contained in an Addendum to this RFP. **Each vendor submitting a proposal, including its representatives, subcontractors, and suppliers, is prohibited from having any communication with any employees or members of the board of commissioners of the County except those employees as designated in this RFP. A vendor who does not comply with this provision may be disqualified from award of the contract.**

This solicitation, all attachments and addenda are incorporated herein by reference to any executed contract resulting from this request for proposal. By submitting a proposal, the vendor agrees to meet all stated requirements, specifications, and terms and conditions stated in this solicitation. If a vendor is unclear about a requirement or specification or believes a change to a requirement would allow for the County to receive a better proposal, the vendor is urged and cautioned to submit these items in the form of a question during the question and answer period.

All addendums and/or corrections will be sent by e-mail to vendors who submit an intent to bid and be posted to the Cumberland County Vendor Self Service site <https://ccmunis.co.cumberland.nc.us/vss/Vendors/VBids/Default.aspx>

!IMPORTANT INFORMATION! CONFIDENTIAL INFORMATION: The proposal must not contain any information marked as "confidential" or as a "trade secret" or in any other manner as to indicate that it is information protected by the Trade Secrets Protection Act (the "Act") as set out in Article 24 of Chapter 66 of the North Carolina General Statutes, unless the Vendor has noticed the County Department of its intent to designate any information in the

proposal as such and received permission from the County Department to do so in writing. Vendor's notice to the County Department must be in writing and must describe the information for which confidentiality is requested and explain how the information is a "trade secret" as defined in G.S. § 66-152(3). If the County Department determines the information for which confidentiality is requested is a "trade secret" covered by the Act, it will notify the Vendor how to mark the information in the proposal and will identify the measures that County will take to protect the confidentiality of the information. Vendor's submission of a proposal after receipt of this notice from the County Department shall be deemed to be acceptance of the County Department's statement of how it will maintain confidentiality. If the County Department determines the information for which confidentiality is requested is not a "trade secret" covered by the Act, it will notify vendor of that determination. Any proposal marked with any information as "confidential" or as a "trade secret" or in any other manner as to indicate that it is information protected by the Act in violation of this section shall be regarded as not responsive to the request for proposals and shall not be considered.

The County reserves the right to reject any and all proposals.

SCOPE OF WORK

A. CUSTOMER SERVICE REQUIREMENTS

The vendor shall assign one representative responsible for Cumberland County Public Library (CCPL hereafter) account.

The vendor shall provide a form for reporting complaints and acknowledge all complaints or concerns within three working days.

The vendor shall accept collect telephone calls or provide a toll-free number.

Telephone contacts from CCPL must be responded to within 1-2 days. E-mail or web contacts from CCPL must be responded to within one day. Mail contacts must be responded to within one week.

B. TASKS

- Provide bibliographic records that meet the standards outlined by the Program for Cooperative Cataloging (PCC) for materials including, but not limited to, the following formats. Please provide an estimate of the number of records currently available that meet PCC standards for each of the groups listed below:
 - a. Print (monograph and serial)
 - b. Audiobooks (CD, CD MP3 and Playaway)
 - c. Video (DVDs and Blu-rays)
 - d. Playaway Tablets & Launchpads
 - e. Spanish language materials in the above formats
- Provide a cataloging interface with:
 - a. The ability to create, edit, copy, and validate bibliographic records in the MARC 21 format.
 - b. The ability to export and download batches of bibliographic records as .mrc files.
 - c. The ability to search for pre-existing bibliographic records and to easily sort and filter the results based on local cataloging standards.
 - d. The ability to expand searches through Z39.50
 - e. The ability for users to create macros that add, remove, and convert data for frequently used fields and formats. These should be customizable beyond first set-up to accommodate for future changes in local and consortium standards.
- Provide technical support, documentation, and training to library staff during initial set-up and ongoing.

The specifications included in this package describe the services that the County feels are necessary to meet the performance requirements of this RFP and shall be considered the minimum standards expected of the proposer. However, the specifications are not intended to purposefully exclude potential bidders.

If the vendor is unable to meet any of the specifications as outlined therein, vendors are advised to submit questions and concerns regarding the specifications during the question and answer period described above.

If the vendor does not submit questions or concerns regarding the specifications, the County shall assume it is able to fully comply with these specifications. The County shall be the sole and final judge of compliance with all specifications. The County further reserves the right to determine the acceptability or unacceptability of any and all alternatives or deviations.

EVALUATION CRITERIA

All qualified proposals will be evaluated and award made based on considering the following criteria to result in an award most advantageous to the County:

1. Record Standards and Availability	30 points
2. Costs	30 points
3. User Interface	20 points
4. Customer Service	10 points
5. Additional Services	5 points
6. References	<u>5 points</u>
	100 points

METHOD OF AWARD

RFP will be awarded based on best overall value method of award.

The County reserves the right to make separate awards to different vendors, to not award, or to cancel this RFP in its entirety without awarding a contract, if it is considered to be most advantageous to the County to do so.

VENDOR'S RESPONSE REQUIREMENTS

The Execution of Proposal (Attachment A) must be completed, signed and submitted with proposals.

A. RECORD STANDARDS AND AVAILABILITY

Vendor's proposal shall demonstrate and will be evaluated based on the number of bibliographic marc records that meet Program for Cooperative Cataloging (PCC) standards (should not include brief records or incomplete records). Records should be available for materials including, but not limited to: Print (monograph and serial), Audiobooks (CD, CD MP3, and Playaway), Video (DVD and Blu-ray), Playaway Tablets & Launchpads, Spanish language materials in all previously listed formats.

B. COST

Cost of the service and any additional fees must be submitted and shall be all inclusive. List all other terms and conditions, considerations and fees. **Exclude all sales tax from your proposal.** If discount is available for prompt payment, identify terms so it may be considered in analyzing proposal. Please attach additional sheets, if necessary.

C. USER INTERFACE

Vendor must provide a test account for the vendor's interface or a guest login for a test database. Must have the ability to: create, edit, copy, and validate records in the MARC 21 format; export and download bibliographic records as .mrc files; search for existing bibliographic records; and sort and filter search results. Sorting and filtering based on local cataloging standards is preferred, as well as the ability to set up staff customizable macros for adding, removing, and converting data for frequently used fields and formats (these macros should be customizable beyond first set-up to accommodate for future changes in local and consortium standards).

D. CUSTOMER SERVICE

Vendor’s proposal shall demonstrate their customer for the initial set-up, training resources for staff, documentation, and on-going technical support.

E. ADDITIONAL SERVICES

Vendor’s proposal shall include any additional services offered not specifically requested in the bid request that might enhance our experience.

F. REFERENCES

Vendors shall provide at least three (3) references for which your company has provided services to similarly sized public libraries, preferably at least one from North Carolina or South Carolina.

COMPANY NAME	CONTACT NAME	TELEPHONE NUMBER	EMAIL ADDRESS

TERMS AND CONDITIONS

IRAN DIVESTMENT ACT: As provided in N.C.G.S. 147-86.55-69, any person identified as engaging in investment activities in Iran, determined by appearing on the Final Divestment List created by the North Carolina State Treasurer pursuant to G.S. 147-86.57(6) c, is ineligible to contract with the County of North Carolina or any political subdivision of the COUNTY.

E-VERIFY: CONTRACTOR shall comply with the requirements of Article 2 of Chapter 64 of the General Statutes. Further, if Contractor utilizes a subcontractor, CONTRACTOR shall require the subcontractor to comply with the requirements of Article 2 of Chapter 64 of the General Statutes.”

DIVESTMENT FROM COMPANIES THAT BOYCOTT ISRAEL: The CONTRACTOR certifies that it has not been designated by the North Carolina State Treasurer as a company engaged in the boycott of Israel pursuant to N.C.G.S. 147-86.81. It is the responsibility of each CONTRACTOR to monitor compliance with this restriction. Contracts valued at less than \$1,000.00 are exempt from this restriction.

INSURANCE REQUIREMENTS:

Providing and maintaining adequate insurance coverage is a material obligation of the CONTRACTOR and is of the essence of this Contract. All such insurance shall meet all laws of the County of North Carolina. Such insurance coverage shall be obtained from companies that are authorized to provide such coverage and that are authorized by the Commissioner of Insurance to do business in North Carolina. The CONTRACTOR shall at all times comply with the terms of such insurance policies, and all requirements of the insurer under any such insurance policies, except as they may conflict with existing North Carolina laws or this Contract. The limits of coverage under each insurance policy maintained by the CONTRACTOR shall not be interpreted as limiting the CONTRACTOR’S liability and obligations under the Contract. During the term of the Contract, the CONTRACTOR at its sole cost and expense shall provide commercial insurance of such type and with such terms and limits as may be reasonably associated with the Contract.

ATTACHMENT A: EXECUTION OF PROPOSAL

EXECUTION

In compliance with this Request for Proposal (RFP), and subject to all the conditions herein, the undersigned vendor offers and agrees to furnish and deliver any or all items/services upon which prices are proposed. By executing this proposal, the undersigned vendor certifies that this proposal is submitted competitively and without collusion, that it and its principals are not presently debarred, suspended, proposed for debarment, declared ineligible from covered transactions by any Federal or State department or agency. Furthermore, the undersigned vendor certifies that it and its principals are not presently listed on the Department of State Treasurer's Final Divestment List as per N.C.G.S 147-86.55-69.

The potential Contractor certifies and/or understands the following by placing an "X" in all blank spaces:

_____ The County has the right to reject any and all proposals or reject specific proposals with deviated/omitted information, based on the County's discretion if the omitted information is considered a minor deviation or omission. The County will not contact vendors to request required information/documentation that is missing from a proposal packet. Additionally, if the County determines it is in its best interest to do so, the County reserves the right to award to one or more vendors and/or to award only a part of the services specified in the RFP.

_____ This proposal was signed by an authorized representative of the Contractor.

_____ The potential Contractor has determined the cost and availability of all materials and supplies associated with performing the services outlined herein.

_____ All labor costs associated with this project have been determined, including all direct and indirect costs.

_____ The potential Contractor agrees to the conditions as set forth in this RFP with no exceptions.

_____ Selection of a contract represents a preliminary determination as to the qualifications of the vendor. Vendor understands and agrees that no legally binding acceptance offer occurs until the Cumberland County Board of Commissioners, or its designee, executes a formal contract and/or purchase order.

Therefore, in compliance with the foregoing RFP, and subject to all terms and conditions thereof, the undersigned offers and agrees to furnish the services for the prices quoted within the timeframe required. Vendor agrees to hold firm offer through contract execution.

Failure to complete, execute/sign (E-signature or handwritten) proposal prior to submittal shall render the proposal invalid and it WILL BE REJECTED.

VENDOR:		
STREET ADDRESS:	P.O. BOX:	ZIP:
CITY & COUNTY & ZIP:	TELEPHONE NUMBER:	TOLL FREE TEL. NO:
PRINCIPAL PLACE OF BUSINESS ADDRESS IF DIFFERENT FROM ABOVE (SEE INSTRUCTIONS TO VENDORS ITEM #10):		
PRINT NAME & TITLE OF PERSON SIGNING ON BEHALF OF VENDOR:	FAX NUMBER:	
VENDOR'S AUTHORIZED SIGNATURE:	DATE:	EMAIL: