I. CONSULTANT/CONSULTING TEAM. The Sonoma County Library is seeking a qualified consultant or consulting team to prepare a detailed assessment of our materials handling workflow that will provide information to assist the Sonoma County Library in considering the purchase of an automated materials handling system or AMH. This assessment will be critical in determining if an AMH system will make delivery services more efficient, ergonomic and timely for all of the branches within the Sonoma County Library system and partner libraries in Lake and Mendocino Counties.

II. ELIGIBILITY. The consultant or consulting team should have demonstrated experience in this type of analysis and be able to provide 2-3 samples of similar studies they have prepared. Consultant or consulting team should have working knowledge of materials handling workflows and current AMH technologies and resources that are in service in many medium to large sized public libraries nationwide. The consultant or consulting team will work with the Interim Library Director and the IT Services Division Manager on this project and will include conversations with technology team members and most importantly the delivery services supervisor.

For consideration, proposals must contain evidence of the consultant or consulting team experience and abilities in the specified area and other disciplines directly related to the proposed services. All consultants shall provide profiles and resumes of the staff assigned to the project. Proposals will be ranked using the following criteria:

- Completeness and quality of response
- Ability to meet requested service needs
- Experience with Automated Materials Handling Systems
- Extensive Experience with RFID Technologies of all types
- Expertise and availability of key personnel
- Total cost to library
- Client references

III. BACKGROUND. The Sonoma County Library, formed in 1975 through a joint powers agreement, is governed by an 11-member commission with representatives from Cloverdale, Cotati, Healdsburg, Petaluma, Rohnert Park, Santa Rosa, Sebastopol, Sonoma, Windsor and the County of Sonoma. Currently, the Library is being managed by an Interim Library Director and a recruitment for a permanent director is in progress.
The library system serves approximately 500,000 residents in the cities, towns, and unincorporated areas of Sonoma County. The Sonoma County Library employs approximately 200 FTE to operate 1 central library, 12 branches and 2 stations countywide.

Until 2017, the library system was funded almost entirely through a share of the property taxes. In November 2016, a one-eighth cent sales tax passed with 72 percent of the vote. With the additional revenue, the library’s operating budget for 2018/19 is $30.5 million.

The library’s public service hours were increased in May 2017. All branches operate on the same schedule: Monday/Wednesday 10am - 9pm, Tuesday/Thursday/Friday/Saturday 10am - 6pm. The Central Library is the only facility that is open on Sundays 2 - 6pm. The stations have limited schedules. There have been many changes in the Sonoma County Libraries in the last 3 years, including multiple leadership changes in the director’s position. In January 2016, the organization put into place an overarching Library Strategic Plan that can serve the organization until 2020. That plan provides a solid foundation and overall direction for the services the Library provides. In February of 2018, the Sonoma County Library administrative services moved from its initial location in downtown Santa Rosa Central library to a leased space in Rohnert Park. This space includes a large warehouse component that currently accommodates the delivery services operations for the Sonoma County Library.

Currently, Sonoma County Library is using the Sirsi/Dynix Horizon System as its ILS. SCL is running Horizon Version 7.5.4.1b along with Enterprise as its web based catalog or discovery layer. Sonoma County Library uses Horizon’s typical SIP and SIP2 protocols for authentication related to self-service checkout and the accompanying RFID system currently in place. Sonoma County Library uses ISO 28560 standard RFID tags in all of the materials circulated throughout its branches. As well, branches throughout the Sonoma County Library use RFID enabled self-check-out units. The current manual delivery system handles about 4,000 items daily, one-third to one-half of these items fill holds throughout the system. The current delivery system services two main delivery routes—north and south with some branches not receiving daily delivery as their volume is much lower as these locations are smaller and more rural in nature. Average delivery time from sorting to location is currently 4 days in a 5-day delivery schedule. Currently Lake and Mendocino Counties do not utilize RFID tags but Sonoma County Library has extended the offer to tag those incoming or shared use items to lend another level of efficiency to the sorting process.

IV. SCOPE OF WORK. The selected consultant or consulting team will communicate regularly with the IT Services Division Manager and the Delivery Services Supervisor. It is anticipated that the below deliverables will be included in the process.

1) Analysis of potential impact of AMH implementation on materials handling and delivery efficiency, patron service provision, operational costs, and allocation of staff resources.

2) Options and recommended approaches for the implementation of SCL AMH systems at the Headquarters facility and at branches. These options and recommendations should specifically address/incorporate the following factors:

- Compatibility with existing ILS (SirsiDynix Horizon)
- Plans for an upcoming facility renovation/relocation/construction (Petaluma Regional Library)
- Options for gradual/incremental implementation of additional AMH components based on individual library needs and available resources.
- Assessment of how to best utilize centralized Delivery and resources.

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• Estimate of initial and ongoing costs of recommend option(s).
• Estimated implementation timeline(s) of recommended option(s).

3) Possible tasks included in the study are as follows:
• Conduct site visits as necessary to library headquarters and meet with designated library staff to discuss and review existing materials handling processes, systems, and facilities.
• Describe the current sorting delivery area noting the key features of the environment, reviewing specific measurements and CAD Drawings for the area currently utilized for sorting, staging and loading of carts and bins.
• Identify and leverage the best practices and usage of technologies that will deliver the greatest impact in the area of timeliness for deliveries to branches and partner libraries in Lake and Mendocino Counties.
• Study existing workflows and provide assessment that demonstrates efficiency and standard ergonomic practices that could/would exist in the AMH environment.
• Recommend best practices with respect to Ergonomics with AMH Systems and related respective costs.
• Review and assess capabilities and current configuration of the SirsiDynix Horizon System and its SIP connectivity.
• Evaluate with IT Services Division Manager and staff regarding network connections, wiring and infrastructure needs for accommodating the type of AMH System.
• Review relevant circulation and collections data.
• Identify options/recommendations for implementing RFID / AMH in SCL Libraries other than the Administrative Headquarters that may assist in successful overarching deployment of AMH.
• Facilitate creation of comprehensive Request for Proposals (RFP) for AMH implementation.

After the contract is awarded to the successful consultant or consulting team, a detailed project-scoping meeting with Interim Library Director, IT Services Division Manager and Delivery Services Supervisor will be scheduled. The Library will provide materials requested by consultant or consulting team in a timely manner and will confirm project timeline. The consultant or consulting team will make at least three visits to Sonoma County Library to meet with staff to review and make recommendations and complete a survey of the environment. Additionally, consultant or consulting team should plan for an in-person presentation of recommendations to the Sonoma County Library Commission.

V. TENTATIVE SCHEDULE

• November 19, 2018 RFI Issued
• December 21, 2018 Proposals Due
• January 2-7 2019 Proposals reviewed, possible calls with consultants
• January 14, 2019 Contract Awarded
• January 22, 2019 Kickoff Meeting
• January 28, 2019 Begin Analysis-Initial full Site Visit
• Early February 2019 Analysis, additional visit
• March 2019 Recommendations presented and discussions with IT and Delivery Staff
• April 2019 Final Recommendations and Presentation to Commission

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VI. FORMAT AND CONTENT OF PROPOSAL

PLEASE NOTE THAT THE LIBRARY HAS ESTIMATED COST OF THIS STUDY AT $25,000.

a) **Cover letter.** Please include the RFI subject, name of consultant or consulting team, address, contact person with all applicable contact information, and date of preparation.

b) **Qualifications.** Describe the background, experience, and capabilities of consultant or consulting team as it relates to the Scope of Work outlined above. Highlight any similar studies done in the last five years.

c) **Scope of Services.** Provide a scope of services and a proposed outline of tasks, products, and schedules. Provide comment on the feasibility of the proposed timeline. Also, identify the extent of Library personnel involvement anticipated to be necessary.

d) **Cost.** Provide cost proposal for scope of services including fixed costs, fees, expenses, reimbursable costs, and any other anticipated costs.

e) **Consulting staff.** Provide the name, title, background, and experience of the primary consultant or consulting team for this project.

f) **Insurance.** List all relevant insurance policies and coverage amounts carried by the consultant or consulting team. The selected consultant or consulting team will be required to submit evidence of and comply with all insurance requirements deemed necessary by the Commission.

g) **References.** Provide a list of at least three clients the consultant or consulting team have contracted with in the past three years who can verify ability to provide the scope of services requested. Provide name, title and complete contact information for each reference.

h) **Additional Services.** The selected firm is welcome to outline additional services or alternative approaches that it feels are in the best interest of the Sonoma County Library.

VII. PROPOSAL SUBMISSION. Deadline for submission is **December 21, 2018 at 5:00 pm PST.** Please submit a signed original of your proposal to Sonoma County Library Director’s Office, 6135 State Farm Drive, Rohnert Park, CA 94928, and send an electronic copy of your proposal to jdemapan@sonomalibrary.org. The selected consultant or consulting team will be notified on or before **January 14, 2019.**

Proposals should be limited to 10-15 pages and be prepared simply and economically, with an emphasis on completeness and clarity of content. Proposals should not contain staples or bindings that impede easy photocopying of materials.

**Contact Vicki Terbovich, IT Services Division Manager, vterbovich@sonomalibrary.org, 707-308-3202 for questions or further information.** Responses to questions from potential consultants will be added to the RFI.

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