

Metropolitan Library System

Delivery Task Force

Progress Report

September 2010

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Introduction

The number of items moving through the SWAN system has grown exponentially since the implementation of patron-initiated borrowing. Because of this ever-increasing volume the Delivery service is handling, MLS created a Delivery Task Force, consisting of member volunteers and MLS staff, to identify solutions for handling the situation.

The original charge of the committee was to review the current state of MLS Delivery, examine other delivery models, and identify options to limit and/or accommodate current and future volume. The charge was changed slightly to include the creation of an emergency plan should members have to fully financially support the service. This document is a progress report of the task force and includes:

1. Other delivery models examined
2. Options to accommodate current and/or future delivery volume
3. Options to limit current and/or future delivery volume
4. Sustainability costs, specifically so libraries can understand what it would cost to run Delivery if MLS could not do so.

The committee was comprised of volunteers from the MLS membership and staff, and met a total of eight times between April and August 2010.

- Rodger Brayden, Forest Park PL
- Dee Brennan, Oak Park PL
- Sharon Highler, Northlake PL
- Jeannie Dilger Hill, La Grange PL
- Christine Kuhn, Westmont PL
- Megan Millen, Flossmoor PL
- Shawn Strecker, Elmwood Park PL
- Su Bochenski, MLS
- Alice Calabrese, MLS
- Renee Clanton, MLS
- Dorothy Kovacs, MLS
- Randy Patka, MLS

Statistics

There are two primary methods MLS uses to calculate delivery statistics, 1) ILL reports and 2) container counts. Libraries included in these statistics are:

- 1) SWAN libraries that receive Direct delivery
- 2) Public Non-SWAN libraries that receive Direct delivery

The Delivery Task Force chose to calculate individual library costs against the SWAN Items Received ILL statistics. The container count statistics are included for informational purposes.

SWAN Interlibrary Loan Statistics

The source of the Interlibrary Loan (ILL) statistics are the [ILL Items Sent and Received](#) monthly links found on the SWAN Statistics website. While libraries receive and send many more items than are represented in the SWAN ILL counts, the task force decided to base the delivery costs on the items received that patrons request.

The ILL statistics do not account for every item that goes through Delivery, namely the items that are checked out in person at one library, and then returned to another (reciprocal returns). A listing of the ILL borrowing statistics is included in Appendix A.

Container Count Statistics

One week per month, MLS Delivery staff counts each container that gets dropped off and picked up at every library. We have assigned an average number of items that fit into each container. These item averages then get counted up to provide the total items delivered. MLS counts a partially filled container as “one,” which makes these statistics averages, not exact item counts.

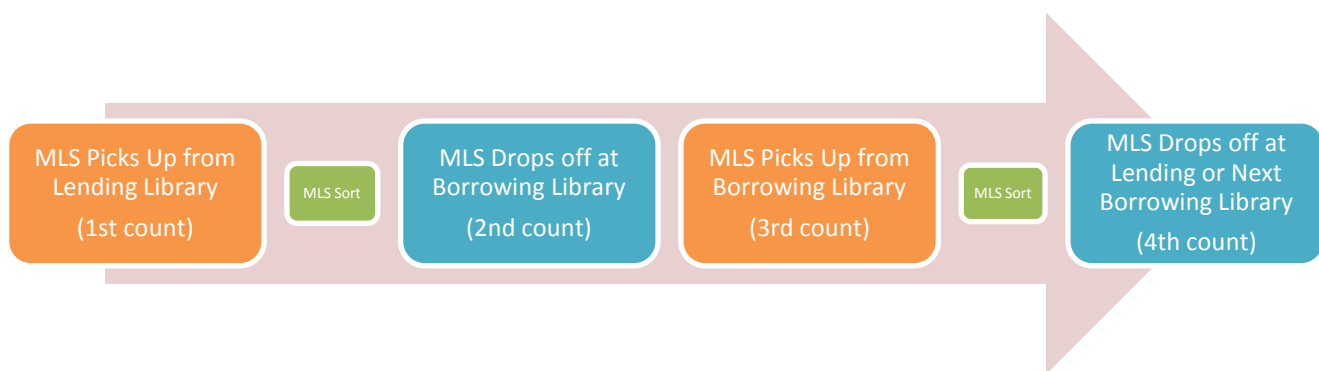
- Blue container = 5 items (3lbs)
- White container = 25 items (18lbs)
- Grey container = 50 items (35lbs)

Container count statistics from January – June 2010 can be found online at the MLS website. Click on an individual library name to see the detail for each library. Please note that the statistics on the website are six week actual counts. See Appendix B for the extrapolated six month average, which can be used for comparison purposes with the ILL statistics.

- All libraries: http://www.mls.lib.il.us/delivery/stats/library_percent.php
- Direct Stop only: http://www.mls.lib.il.us/delivery/stats/library_percent_no_on_demand.php
- On Demand only: http://www.mls.lib.il.us/delivery/stats/library_percent_on_demand.php

Tracking Volume Activity

There have been frequent questions regarding “how many times is an item counted?” in relation to the container count statistics. To use precise terminology, MLS doesn’t count unique items; they count how many times items are handled. This provides the volume activity information that is required in order to properly staff the department. Below is a graphic that illustrates this concept.



Other Delivery Models

Nine other delivery models across the country were identified and investigated. Below is a summary of findings for each.

[Colorado Library Consortium, clicweb.org](http://clicweb.org), researched by Rodger Brayden

There were several interesting aspects of the Colorado delivery service situation:

- The geographic area is the entire State of Colorado, including about 400 libraries, and about 300 daily stops.
- Three, four or five day per week delivery options are available.
- Volume for the most recently recorded year was about 5 million unique items.
- Service is outsourced to a private concern, that uses a variety of vehicles on already existing routes, and which delivers items other than library materials.
- The system is managed by one part time (25 hours per week) employee of the consortium, and four employees of the courier, who work at two regional sorting centers in the state.
- Packaging requirements appear to be no more onerous than those used in MLS.
- Cost of the service for the most recently recorded year was \$720K, attributed in part to the shared routes used by the courier. Orange County Library System

[Wisconsin Library System, sclsdelivery.info/network](http://sclsdelivery.info/network), researched by Dee Brennan

The Wisconsin Libraries Delivery Network serves as the statewide delivery service provider and also provides delivery to the seven-county public library system. It is a total in-house service. In addition to typical resource sharing materials, they also deliver equipment supplies and furniture at no additional cost. The majority of libraries receive delivery 6 days per week. Because of the volume at some locations, libraries may get deliveries 2 or even 3 times daily. Libraries are only required to label items filling holds at other libraries, not if items are just going home. This has reduced labeling time at libraries and speeded up sorting on the delivery end. Delivery routes are staggered throughout the day to maintain a consistent but not overloading sorting workflow each day. The overall budget is \$2.4 million annually; statewide service costs a little more than \$1.4 million, and the system service is a little over \$900K. The pricing model is cost recovery/cost sharing. The delivery system pays for 60% of each county's cost, and the counties pay the rest, using different formulas from county to county. The turnaround time ranges from same day to 3 days depending on frequency a library receives delivery each week.

[Northeast Massachusetts Library System, nmrls.org/delivery](http://nmrls.org/delivery), researched by Jeannie Dilger-Hill

Northeast Massachusetts Library System is a regional library system very similar to us in number of public libraries, annual volume, and delivery frequency. They, too, are losing their state funding. Currently, their operation is outsourced to a local courier service, at a cost of about \$500,000/year. However, they have just issued an RFP for an automated materials handling system, which would significantly reduce staff costs in labeling and sorting.

[SWON Libraries, wonlibraries.org](http://wonlibraries.org), researched by Sharon Highler

SWON uses an outside vendor. Ace Expeditors is the delivery service contracted by SWON Libraries to handle deliveries between member libraries. This has been in place for several years, and their agreement is available online. Members are asked to use the shipping label that prints out after they place their order online. The

shipping label includes a bar code that will be scanned by the driver to verify pick-up. If they are unable to print the label, they attach a bill of lading with each delivery. Items will not be accepted by the driver without a shipping label or bill of lading form. All drivers are uniformed and display a name badge at all times.

[Lanter Delivery Systems, lanterdeliverysystems.com/library.aspx](http://lanterdeliverysystems.com/library.aspx), researched by Alice Calabrese

The Consortia of Academic Libraries in Illinois (CARLI) have used Lanter to provide their delivery service for about two years. Lanter does not offer a sorting function, just independent courier delivery.

1. Each institution sorts to 80+ locations.
2. Items are then delivered by independent couriers to each institution.
3. Library system headquarters are utilized as drops for public libraries, school libraries and academic libraries that are not members of CARLI.
4. Contract is established and negotiated on a yearly basis.

Company officials have informed MLS that they would be hesitant to sign a contract with an Illinois Library System due to the state of funding. They are concerned payment would not be prompt or forthcoming.

[Minitex – Minnesota, minitex.umn.edu](http://minitex.umn.edu), researched by Randy Patka

Minitex is located in the Elmer L. Andersen Library on the University of Minnesota's West Bank Campus, serving Minnesota, North and South Dakota, and also has reciprocal delivery into Wisconsin. Minitex offers courier delivery service to 225 member libraries and library systems, handling 1,000,000 loaned material deliveries with a staff of 5 full time plus 4 part time students. Their new special purpose designed work area utilizes several conveyor systems but does not feature any automated sorting (RFID or Bar Code). Annual budget is \$640,000, \$250,000 of which is courier costs; the balance is staff, supplies and all overhead. All containers are Minitex supplied and funded. Other than two small courier routes in the far north of the State, the couriers do not provide any sorting of loaned materials. Minitex receives container packed loaned materials from the courier routes, sorts the materials in-house at their facility to the local library and regional library system level and then ships them out via courier. Most items receive next day delivery per courier contracts. Minitex owns one small van which is used for small pickups at the Minnesota State University library.

[Michigan, mls.li.mi.us](http://mls.li.mi.us), researched by Shawn Strecker

Midwest Collaborative for Library Services (MeL) serves 693 libraries of every type (public, academic, special) from all over the state of Michigan, and the UP is a particular challenge. MeL currently outsources the delivery to a medical courier company. There are two levels of pricing, sorted and non-sorted. A library can choose to sort their material to lower their costs. The other factor in their price is also based on the number of stops. The minimum is two stops, up to a maximum of five stops a week. Because they are serving multiple types of libraries, developing and enforcing standards for the libraries to follow has been a challenge. Once a library joins MeL's delivery, renewal every year is automatic, and it is the library's responsibility to terminate the membership. There is a listserv to communicate information to and between members, and each library must designate a point person to monitor the listserv. They have had some exciting incidents...car-jacked, the truck fire, the driver that died on route, and the bag of items that were lost and held for ransom by an unknown person! Delivery is never dull.

Mobius, momius.missouri.edu, researched by Shawn Strecker

Mobius is an academic consortium using Innovative in Missouri, with a volume of about 200,000 items per year. The delivery between libraries is outsourced, with minimal staff involvement at the consortium office (one person). The libraries do their own sorting, and the consortium chooses the bags that are used. In the early years of Mobius, the state picked up the cost of delivery. Now the cost is assigned by stop, regardless of size of the library or amount of material.

Volume Accommodation Options

The task force identified options to handle the current and anticipated future delivery volume, and then identified possible pros and cons for each option. This is meant to be an initial identification and assessment of options; prior to implementation each would require further in-depth study.

1. Optimize Delivery Operations

Increase efficiency in areas such as routes, equipment, processes, etc. Outside consultants may be used.

Pros	Cons
<ul style="list-style-type: none"> • Gain efficiencies • Easy to implement • No additional cost • Fuel costs • Time savings • Injury reduction 	<ul style="list-style-type: none"> • Outsource costs

2. Home Delivery

Deliver items in the existing collection to patrons' homes upon request, using a standard shipping service.

Pros	Cons
<ul style="list-style-type: none"> • Added value service to patrons • Cost shifts to patrons • Decreased delivery volume 	<ul style="list-style-type: none"> • Packaging • Staff/space • Return on Investment (ROI) • ILL modification (training, cost, implementation) • Small % of the patron base served

3. Centralized Automated Sorting

Use a fully automated robotic sorting system (Example: King County Library System automated materials handling machine. <http://www.youtube.com/watch?v=4fq3CWsyde4>)

Pros	Cons
<ul style="list-style-type: none"> • Less staff time to sort • Accuracy • Less physical strain • Sorter can work 24/7 • Less library time to sort • Less repetitive stress injuries from sorting • Potential staff time savings (check ins) • Greater accountability 	<ul style="list-style-type: none"> • Cost • May increase volume • Space • Standardize/agreement with all members • Implementation cost • Maintenance • ILL modification (training, cost, implementation)

4. Sort on Route

Perform in-route (on-truck) sorting for upcoming stops.

Pros	Cons
<ul style="list-style-type: none">• Same day delivery for some items, shortened delivery time for others• Ease MLS staff sort time	<ul style="list-style-type: none">• Increase route time• May need different trucks, routes, which will increase cost

5. Sort in Libraries

Perform additional level of sorting in libraries.

Pros	Cons
<ul style="list-style-type: none">• Ease MLS staff sort time• Shorten turnaround time for patrons• Ease physical burden on MLS staff	<ul style="list-style-type: none">• Library space• Library staff time• Cost of containers• May need different trucks• Could be logistically complicated

6. Smart Sourcing (Holds Cluster)

Upon placing a hold request, the ILS fills first within the library, then within the route, then outside the route.

Pros	Cons
<ul style="list-style-type: none">• Shorten turnaround time for patrons• Ease MLS staff sort time• Fuel cost savings	<ul style="list-style-type: none">• Has to work in conjunction with another sorting option (on route or at library)• ILL modification (training, cost, implementation)• Member concerns (uneven load)• Return on Investment (ROI)

7. Outsourcing

Need to gather more information and pricing.

Pros	Cons
<ul style="list-style-type: none">• Cost• Only have contract management• Non-library delivery• No facility/less staff• No trucks	<ul style="list-style-type: none">• Lost/damaged materials• Someone has to be the fiscal agent and manage the contract• Security• Training• Need to establish a support group• Loss of control• Loss of personalized service

8. Floating Collections

The loaned item stays at the borrowing library until it is requested again. "The item lives where it gets returned."

Pros	Cons
<ul style="list-style-type: none">• Flexible collections based on patron need• Reduces delivery volume• Long term solution• Innovative already has a module	<ul style="list-style-type: none">• All libraries have to agree/standardize• ILL module (training, cost, implementation)• Political issues• Loan rules/call number standardization

9. Expand Current Operation

Increase the amount of routes, trucks, shifts, delivery days, staff, etc.

Pros	Cons
<ul style="list-style-type: none">• Easy to implement• Proven system• Libraries are comfortable• Continued patron satisfaction• Centrally located	<ul style="list-style-type: none">• Added cost• May not be long term solution• Costs will continue to increase• Limited space resources

10. Separate Facility

Move delivery options to a different location.

Pros	Cons
<ul style="list-style-type: none">• Ability to handle increase volume• Ability to develop "Best Facility" practices• Ongoing cost	<ul style="list-style-type: none">• Upfront cost• May need to retrofit location

Limiting Volume Options

The task force identified options to limit the current and anticipated future delivery volume, and then identified possible pros and cons for each option. This is meant to be an initial identification and assessment of options; prior to implementation each would require further in-depth study.

1. Charge Patrons for Holds

This option could include holds not picked up, holds place, or holds placed over X amount. Depending on what is charged for, this option can be considered a Service Fee vs. Fine.

Pros	Cons
<ul style="list-style-type: none"> • Generate revenue • Reduce volume • Reduced staff time at libraries for managing holds • (To investigate: automatic charge via Innovative software at time of hold?) 	<ul style="list-style-type: none"> • Unhappy patrons, poor service, bad PR • Discriminates against the poor (depends on Service Fee vs. Fine) • Increased staff time to collect fines (depends on Innovative software options) • Library resistance

2. Cooperative Collection Development

Consortia-wide collection

Pros	Cons
<ul style="list-style-type: none"> • Having the right things in the right place reduces volume • May work better in conjunction with clusters 	<ul style="list-style-type: none"> • Difficult to implement • Need policing • Unwieldy

3. Reduced Checkout Limits

Limit the total number of items that can be checked out.

Pros	Cons
<ul style="list-style-type: none"> • May reduce volume if limit is drastically reduced 	<ul style="list-style-type: none"> • Unhappy patrons, poor service, bad PR • May increase re-delivery of items when holds exceed limits.

4. Reduced Hold Limits

Limit the number of items that can be placed on hold. See Appendix E for formulas on how to create a snapshot report of patron holds, i.e. patron accounts with holds on a given day.

Pros	Cons
<ul style="list-style-type: none"> • May reduce volume if limit is drastically reduced (for example, 10) 	<ul style="list-style-type: none"> • Unhappy patrons, poor service, bad PR • May increase reciprocal return volume

5. Increase Non-Holdable rules

Example: No holds on new books for 6 months; no holds on DVD's; no holds on children's

Pros	Cons
<ul style="list-style-type: none"> • Reduce volume • Reduced library staff time 	<ul style="list-style-type: none"> • Unhappy patrons, poor service, bad PR • Defeat the goal of Resource Sharing • Discrimination?

6. Return Items to Owning or Borrowing Library

This option may require the elimination of library book drops. A convenience charge could also be used in conjunction with this option. [NOTE: The task force does not consider this a feasible option.]

Pros	Cons
<ul style="list-style-type: none"> • Reduce volume • Reduced library staff time 	<ul style="list-style-type: none"> • Difficult or impossible to implement/enforce • Would probably require elimination of book drops • Unhappy patrons, poor service, bad PR • Patrons won't do it – they will just use the book drop

7. Return to Manual Clear Hold Shelf

Pros	Cons
<ul style="list-style-type: none"> • Not sending back items still wanted locally • Would decrease some volume – small amount 	<ul style="list-style-type: none"> • Can't do patron-cancelled holds, which also limits volume • Complicate clear hold shelf process (less streamlined)

8. Merge Libraries

Pros	Cons
<ul style="list-style-type: none"> • Decrease number of delivery stops • Possibility for some areas – would make a lot of sense • Other (non-delivery) cost savings 	<ul style="list-style-type: none"> • Time to implement – very long term • Requires referenda, etc. • Political

9. Stricter Limits on I-type

Pros	Cons
<ul style="list-style-type: none"> • Would have significant impact on volume (FL system = 25% DVD) • Could redefine "Current Item A, B..." to include print • Encourage more frequent visits to library 	<ul style="list-style-type: none"> • Patron service • Doesn't accommodate exceptions – schools/homework, etc. • PR • Print limits could impact summer reading

10. Central “Popular” Collection at MLS (floating, Amazon model)

Pros	Cons
<ul style="list-style-type: none"> • Eliminates moving items to delivery location • Creates space in individual libraries • Faster turnaround time for patron • Easier retrieval • Reduces impact on local staff 	<ul style="list-style-type: none"> • Must be housed with delivery system to create benefit (space to house) • Need additional staff to pull and process items • “Turf Wars” – need to own item • Need to develop and maintain collection • Smaller browsing collections in libraries • Start up costs

11. Geographic Borrowing

Preference is by delivery route.

Pros	Cons
<ul style="list-style-type: none"> • Saves delivery staff sorting • Faster turnaround in some cases • Reduces number of times item handled 	<ul style="list-style-type: none"> • Sorting space in libraries • Must be done in conjunction with sorting in libraries or on trucks • Might have to pay for software changes • Doesn’t reduce the number of items

12. 24-Hour Hold Postponement (grace period)

To allow time for local library copy to get returned.

Pros	Cons
<ul style="list-style-type: none"> • Already have capability to limit holds only to local items • Would have a minimal impact on volume 	<ul style="list-style-type: none"> • How do you decide the timeframe? 24 hours? 48 hours? • Cost of special development • Longer time to fill holds • Would have a minimal impact on volume

13. Uniform System-wide Extended Loan Periods

Alternate option: anything less than 7-day loan must be non-holdable.

Pros	Cons
<ul style="list-style-type: none"> • Eliminate re-request because patron didn’t have enough time • Decreases volume • Patrons and staff would all know loan periods – no confusion, easy to communicate • Easy to implement in SWAN 	<ul style="list-style-type: none"> • Gaining agreement • Libraries who have to increase loan time would have less available for browsing • Board approval for some libraries

14. Downloadable Multimedia

Encourage libraries to purchase more e-books, audiobooks, music, movies, etc.

Pros	Cons
<ul style="list-style-type: none">• Reduced physical delivery	<ul style="list-style-type: none">• Cost• Increased technology needs for staff and patrons• Proprietary, copyright concerns

SWAN Solutions Already Implemented

MLS Delivery and SWAN Council have discussed ways to reduce the volume in delivery. While broader infrastructure changes are still being discussed, three areas within SWAN's ILS parameters have been identified to significantly reduce the load in delivery and the amount of items processed by circulation staff. The proposed changes working in conjunction are (1) limiting the number of holds system-wide that can be placed by patrons, (2) system-wide roaming, and (3) adherence to the best practice loan rules. These changes were introduced at the SWAN Quarterly meeting in September 2009 and discussed again at the quarterly meeting in December 2009.

Maximum Holds

SWAN members are being asked with this vote to limit the number of holds globally to 75. This will not override current hold limits that are LESS than 75, but will bring down the maximum number of holds for all libraries who have this set above 75. This parameter change will take effect when "Patron Cancelled Holds" are turned on.

Vote to approve passed on February 19, 2010 with a membership vote of 54-0.

Patron Cancelled Holds

SWAN implemented a feature to allow patrons to cancel their own holds. This could prevent unwanted items being delivered without staff intervention. Clear Hold Shelf was implemented previously in order to provide this functionality, which may have increased delivery volume.

Feature was implemented on April 12, 2010.

System-wide Roaming

SWAN Council has reviewed the suggestion to have all materials that are eligible for interlibrary loan roam and believes that it is the best practice for the consortium. This will likely:

- reduce the number of items circulating through M.L.S. delivery,
- fill holds more quickly, and
- result in less patron wait time

Libraries that currently have their materials return home, will have the option to adjust their loan rules to control which materials are available for interlibrary loan and roaming. To discuss options, libraries may contact SWAN Services.

While we recognize that it will be a little more difficult to assign responsibility for damaged items with universal roaming in place, libraries should fairly adhere to the current statewide interlibrary loan code. The code calls for the borrowing library to be responsible for damages.

Vote to approve passed on April 9, 2010 with a membership vote of 43-12

Best Practice Loan Rules

Information on Loan Rules Best Practices can be found on the member's only section of the SWAN website:

- <http://www.mls.lib.il.us/swandoc/LoanRuleBestPractices20090609.pdf>

Delivery Solutions Already Implemented

Fine Sorting at Libraries

During the Delivery Task Force discussions, a simple, low-cost solution was identified that was implemented immediately, which is to begin an additional separate sort to three of the heaviest volume libraries within routes. The libraries that were asked to participate are the “gray tub stops,” which are the larger volume libraries. The “white tote stops” do not generate sufficient volume to fill up separate containers for the three additional libraries within their route (but they may be added later).

By implementing these “fine sorting” procedures, it will allow the drivers to keep a substantial number of these presorted materials on their truck for same or next day delivery, without having to return inside MLS for sorting and reloading back on the truck. If everyone participates, we anticipate that this will save us one cart of items, which is about 500 lbs and 45 minutes of work, per truck each day.

This solution was implemented July 27, 2010 and is being evaluated for efficacy.

Sustainability Costs/Scenarios

These scenarios represent options for how to handle the situation if MLS could no longer financially support the Delivery service, and members chose to continue the service through self-funding. The committee identified three scenarios to investigate.

- 1) Current Location
- 2) New Location
- 3) Outsource

During investigation of these scenarios, the Delivery Task Force Committee decided that that a Multiple Locations scenario was not immediately feasible, given the large number of variables and the location-centric aspect of the Delivery service.

Pricing Formula

The committee decided that for initial purposes, the formula that would be used to calculate library costs would be made up of two parts. This pricing formula is calculated with the assumption that all SWAN direct delivery and public non-SWAN direct delivery libraries would participate.

1. Base fee that is the total overhead expenses divided by the number of stops. Overhead includes:
 - a. Building & Grounds
 - b. Telephone & Telecommunications
 - c. Insurance
2. Percentage of the SWAN Received Interlibrary Loans for each stop
 - a. Operating expenses (everything except overhead) would be divided based on the percentage of the SWAN Received ILL for each stop.
 - b. The statistics used to calculate the volume percentage come from the ILL Items Sent and Received monthly links found on the SWAN Statistics website. See page 3 for an explanation of these statistics, and Appendix A for specific costs.

Delivery on Demand

The committee identified two options for Delivery on Demand stops.

- 1) Discontinue Delivery on Demand
- 2) Libraries could pay a fee to participate (the specific fee is to be determined)

This area needs more investigation and discussion with members before any decisions could be made regarding this service.

Indirect Delivery

- 1) Libraries could continue using their public library as the drop off point (indirect). It would be a local decision if the public library decided to charge for this service.

CARLI

Currently, the Consortium of Academic and Research Libraries in Illinois (CARLI) uses MLS as a consolidated drop point, who then delivers the materials to individual libraries. The committee identified three potential options for how to handle CARLI in the future if Delivery was member-funded.

- 1) Discontinue CARLI delivery. Currently there are about 200,000 items delivered to MLS patrons via CARLI. Libraries could use OCLC to request these items which would be delivered via mail.
- 2) Request that CARLI deliver to individual libraries.
- 3) Request that CARLI sort to individual libraries, and then MLS will deliver to individual libraries.

This area needs more investigation and discussion with CARLI before any decisions could be made regarding this service.

SWAN Member Participation

The Delivery Task Force recommends that the SWAN Council and SWAN membership discuss their philosophy of service regarding Delivery. The task force believes that the SWAN and Delivery services are inextricably linked, and all SWAN members should participate in Delivery.

Current Location

1. Description / Narrative

At the current location, there are two scenarios 1) libraries participating in Delivery would be solely responsible for the management and maintenance costs of Delivery operations as well as the facility, and 2) libraries participating in Delivery would share the applicable costs with the SWAN service.

Delivery operations would remain in its current configuration at the current location of 125 Tower Drive, Burr Ridge IL. The current space occupies 1,500 sq ft of indoor sorting space and an additional 1,250 sq ft of garage space for book carts and storage. The trucks occupy 3,100 sq ft of indoor garage space for a total of 5,858 sq ft. The delivery process currently consists of four delivery routes and a team of four full time route drivers, eight part-time drivers and two full-time inside staff. There is a fleet of five delivery trucks, which are 16' GMC Savannah Cutaway trucks, with four trucks on daily duty and one truck held as a spare for maintenance downtime. In this scenario, we would continue to provide five day per week delivery service to all SWAN members.

2. Planning Costs

See Appendix C for the detailed planning costs.

Current Location Transition Costs		
Cost type	Estimated Cost	Notes
Overhead	\$0	
Operating	\$0	

Current Location Sub-Scenario 1- Full Ongoing Costs		
Cost type	Estimated Cost	Notes
Overhead	\$229,057	Building & Grounds, Insurance, Telecommunications
Operating	\$602,209	Delivery operating expenses
Total	\$831,267	

Current Location Sub-Scenario 2- Ongoing Costs (Share with SWAN)		
Cost type	Estimated Cost	Notes
Overhead	\$122,932	Building & Grounds, Insurance, Telecommunications
Operating	\$602,209	Delivery operating expenses
Total	\$725,142	

3. Implications

There are no immediate negative implications to remaining at the present location. There would be no transition costs or downtime associated with this option.

New Location

1. Description / Narrative

Delivery operations would physically move to a new location (either rented or purchased, but not a SWAN member library). Libraries participating in Delivery would be solely responsible for the management and maintenance costs of Delivery operations as well as any related building costs (insurance, utilities, maintenance, etc. if needed). A new facility would require up to 5000 sq ft plus dock space and parking for delivery vehicles and staff. Indoor garage space for the trucks with immediate access to the sorting operation, while not mandatory, would be preferred. A central location with convenient access to the major expressways (I-294, I-55 and I-355) would maximize route optimization. A facility with an open layout would improve workflow and make it possible to install new and/or automatic sorting equipment. Minimal office space would be needed at the new facility, but a phone line, internet connection, and staff facilities would be required.

2. Planning Costs

We cannot estimate costs for a new location at this time due to the large number of variables involved. For example, depending on the status of MLS, a separate Delivery service may or may not have to purchase trucks. We did receive an estimate of real estate costs, which were \$6.00 - \$12.50 per square foot average.

3. Implications

Moving to a new local location does not pose any significant hardships on staff and would be a relatively seamless change for the membership. The assets that would need to be moved include sorting tables, steel book carts, tubular tote racks, and containers can all be transported using the delivery trucks and staff over one weekend. Depending on the location of the new facility, there may need to be a reworking of the routes.

It is not anticipated that there would be any major impact on daily delivery service during the move or startup of operations at a new facility.

A significant unknown at this time is whether or not a member-supported Delivery service would be able to purchase or use assets currently belonging to MLS (i.e. trucks, sorting furniture, containers, computers, etc.)

This scenario was evaluated in order to calculate the costs of a different facility, but is probably not feasible as an option unless Delivery decided to become its own separate legal entity or became a division of SWAN. Realistically, in the event of MLS being unable to support the service, moving Delivery to a new facility could probably only be undertaken in cooperation with the SWAN service.

Outsourcing

1. Description / Narrative

As an alternative to conducting Delivery operations in-house, members, as a consortium, could contract with an outside vendor for delivery and/or sorting services. Potential benefits of outsourcing are reduced assets, reallocation of Human Resources, route optimization, variable cost structures, reduced administrative burden, and industry expertise and latest technology.

2. Planning Costs

The Delivery Task Force committee created and sent out a Request for Information (RFI) to fourteen outsourcing couriers, and chose three to interview. After the interviews, the group concluded that the concept of outsourced delivery is definitely viable. However, pricing out the service requires further work with the vendors. Each vendor stated that variable nature of our Delivery service required further study to be able to present even estimated quotes. Therefore, there is no pricing included for the outsourcing option at this time. MLS will work with the identified primary vendor to begin the pricing and investigation process, and will share the results with the membership.

See Appendix F for the RFI.

3. Implications

As a result of implementing outsourcing, there could be an increased workload for member library staff if fine sorting to all libraries is required. When dealing with a vendor, there may be less ability for customization, and may result in some change in procedures and culture for member library staff. There would be less of an opportunity for member libraries to set and control costs. It is possible that we may have to form a governing body similar to SWAN to contract with a vendor, although some vendors may be willing to contract with each library individually.

Eliminating the MLS fleet is a serious undertaking, and the stability of the outsourcing company needs be carefully examined.

Worst Case Scenario

During the course of the Delivery Task Force sessions, a 50% spike in delivery volume occurred for a short time due to Oak Park Public Library going live on SWAN, as well as the regular higher volume during the summer months. The task force conducted a brainstorming session to identify potential solutions for “worst case scenarios.”

These solutions were preliminarily presented to SWAN Council and Governance Groups for feedback. SWAN Council continues to study the recommendations for feasibility.

As of September 2010, volume has stabilized, and the task force is not recommending immediate implementation of any of these options. However, the task force recommends that these options remain on a list for further exploration as needed.

We recognize that many of these items are in philosophical opposition to the goal of resource sharing. However, during this time of financial crisis, we felt it to be prudent to at least explore all options and scenarios.

Some of the options we explored were:

1. Short Term Options to Investigate / Discuss
 - a. Limit number of holds by ltype (e.g. no holds on new items except local)
 - b. Further limit number of holds patrons can place
 - i. Unsure if this would have a significant impact on volume
 - ii. Would need to reduce the maximum number to below the average
 - c. Make any items with loan periods less than 7 days non-holdable
2. Long Term Options to Investigate / Discuss
 - a. Fill holds with local copy only, if owned locally
 - b. Agency Holds, an Innovative Product not owned
 - c. Geographic borrowing using the Priority Paging settings
 - d. Automatic fee charge for holds placed¹
 - e. Automatic fee charge for non-pickup of holds¹
 - f. Modify/Turn off “copy return soonest” for holds

Any changes made to SWAN need to follow the standard process, i.e. approving changes through the membership, and placement on the SWAN priority list by the SWAN Director and SWAN Council.

Conclusion

The Delivery Task Force plans to continue its work investigating outsourcing costs and efficiency options, with the goal of sustainability in the future. In addition, the task force recognizes that a merger of MLS and other library systems is likely, and wants to participate in helping build the future of library delivery service.

¹ The task force recognizes that any decision to charge patrons for delivery service is a local decision. However, we recommend that SWAN Council and membership discuss the implications of this local decision, specifically regarding the impact on consistency across library regions.

Appendix A: ILL Statistics

Appendix A: ILL Statistics p 1 of 2 (January – June 2010). Please note that bookmobile and branch numbers were added into the main library, and that Oak Park numbers are an estimate of future volume.

#	Borrowing Library	Number of Items Received	% of Total	Operating Costs Fee	Base Fee Current Location Full Costs	Base Fee Current Location Share costs w/ SWAN
1	Acorn	9136	1.29%	\$ 7,749.22	\$ 2,759.72	\$ 1,481.11
2	Alsip	6840	0.96%	\$ 5,801.73	\$ 2,759.72	\$ 1,481.11
3	Bedford Park	740	0.10%	\$ 627.67	\$ 2,759.72	\$ 1,481.11
4	Beecher	3723	0.52%	\$ 3,157.87	\$ 2,759.72	\$ 1,481.11
5	Bellwood	4618	0.65%	\$ 3,917.02	\$ 2,759.72	\$ 1,481.11
6	Berkeley	3223	0.45%	\$ 2,733.77	\$ 2,759.72	\$ 1,481.11
7	Berwyn	13238	1.86%	\$ 11,228.56	\$ 2,759.72	\$ 1,481.11
8	Blue Island	8322	1.17%	\$ 7,058.78	\$ 2,759.72	\$ 1,481.11
9	Bridgeview	4810	0.68%	\$ 4,079.87	\$ 2,759.72	\$ 1,481.11
10	Broadview	1208	0.17%	\$ 1,024.63	\$ 2,759.72	\$ 1,481.11
11	Brookfield	10931	1.54%	\$ 9,271.75	\$ 2,759.72	\$ 1,481.11
12	Brookfield Zoo	843	0.12%	\$ 715.04	\$ 2,759.72	\$ 1,481.11
13	Calumet City	7006	0.99%	\$ 5,942.54	\$ 2,759.72	\$ 1,481.11
14	Calumet Park	1242	0.17%	\$ 1,053.47	\$ 2,759.72	\$ 1,481.11
15	Chicago Heights	7492	1.06%	\$ 6,354.77	\$ 2,759.72	\$ 1,481.11
16	Chicago Ridge	5275	0.74%	\$ 4,474.29	\$ 2,759.72	\$ 1,481.11
17	Cicero	7629	1.07%	\$ 6,470.97	\$ 2,759.72	\$ 1,481.11
18	Clarendon Hills	4849	0.68%	\$ 4,112.95	\$ 2,759.72	\$ 1,481.11
19	Crestwood	3219	0.45%	\$ 2,730.38	\$ 2,759.72	\$ 1,481.11
20	Crete	9331	1.31%	\$ 7,914.62	\$ 2,759.72	\$ 1,481.11
21	Dolton	4719	0.66%	\$ 4,002.69	\$ 2,759.72	\$ 1,481.11
22	Downers Grove	46537	6.55%	\$ 39,473.00	\$ 2,759.72	\$ 1,481.11
23	Eisenhower	16667	2.35%	\$ 14,137.06	\$ 2,759.72	\$ 1,481.11
24	Elmhurst	38866	5.47%	\$ 32,966.40	\$ 2,759.72	\$ 1,481.11
25	Elmwood Park	12943	1.82%	\$ 10,978.34	\$ 2,759.72	\$ 1,481.11
26	Evergreen Park	8564	1.21%	\$ 7,264.04	\$ 2,759.72	\$ 1,481.11
27	Flossmoor	11844	1.67%	\$ 10,046.16	\$ 2,759.72	\$ 1,481.11
28	Forest Park	8262	1.16%	\$ 7,007.88	\$ 2,759.72	\$ 1,481.11
29	Frankfort	8196	1.15%	\$ 6,951.90	\$ 2,759.72	\$ 1,481.11
30	Glenwood-Lynwood	7944	1.12%	\$ 6,738.15	\$ 2,759.72	\$ 1,481.11
31	Grande Prairie	8851	1.25%	\$ 7,507.48	\$ 2,759.72	\$ 1,481.11
32	Green Hills	259	0.04%	\$ 219.69	\$ 2,759.72	\$ 1,481.11
33	Harvey	1541	0.22%	\$ 1,307.09	\$ 2,759.72	\$ 1,481.11
34	Hillside	4123	0.58%	\$ 3,497.16	\$ 2,759.72	\$ 1,481.11
35	Hinsdale	13553	1.91%	\$ 11,495.75	\$ 2,759.72	\$ 1,481.11
36	Hodgkins	1756	0.25%	\$ 1,489.45	\$ 2,759.72	\$ 1,481.11
37	Hometown	115	0.02%	\$ 97.54	\$ 2,759.72	\$ 1,481.11
38	Homewood	20689	2.91%	\$ 17,548.55	\$ 2,759.72	\$ 1,481.11
39	Indian Prairie	35510	5.00%	\$ 30,119.82	\$ 2,759.72	\$ 1,481.11
40	Justice	1600	0.23%	\$ 1,357.13	\$ 2,759.72	\$ 1,481.11
41	La Grange	14986	2.11%	\$ 12,711.23	\$ 2,759.72	\$ 1,481.11

Appendix A: ILL Statistics p 2 of 2 (January – June 2010). Please note that bookmobile and branch numbers were added into the main library, and that Oak Park numbers are an estimate of future volume.

#	Borrowing Library	Number of Items Received	% of Total	Operating Costs Fee	Base Fee Current Location Full Costs	Base Fee Current Location Share costs w/ SWAN
42	La Grange Park	14253	2.01%	\$ 12,089.49	\$ 2,759.72	\$ 1,481.11
44	Lansing	2930	0.41%	\$ 2,485.25	\$ 2,759.72	\$ 1,481.11
45	Lisle	2345	0.33%	\$ 1,989.04	\$ 2,759.72	\$ 1,481.11
46	Lyons	2741	0.39%	\$ 2,324.93	\$ 2,759.72	\$ 1,481.11
47	Markham	1391	0.20%	\$ 1,179.86	\$ 2,759.72	\$ 1,481.11
48	Matteson	8846	1.25%	\$ 7,503.24	\$ 2,759.72	\$ 1,481.11
49	Maywood	1486	0.21%	\$ 1,260.44	\$ 2,759.72	\$ 1,481.11
50	McCook	320	0.05%	\$ 271.43	\$ 2,759.72	\$ 1,481.11
51	Melrose Park	5428	0.76%	\$ 4,604.07	\$ 2,759.72	\$ 1,481.11
52	Midlothian	5702	0.80%	\$ 4,836.48	\$ 2,759.72	\$ 1,481.11
53	Nancy McConathy	2620	0.37%	\$ 2,222.30	\$ 2,759.72	\$ 1,481.11
54	North Riverside	2968	0.42%	\$ 2,517.48	\$ 2,759.72	\$ 1,481.11
55	Northlake	6525	0.92%	\$ 5,534.55	\$ 2,759.72	\$ 1,481.11
56	Oak Lawn	18463	2.60%	\$ 15,660.44	\$ 2,759.72	\$ 1,481.11
57	Oak Park	35000	4.93%	\$ 29,687.24	\$ 2,759.72	\$ 1,481.11
58	Oak Park - Dole Branch		0.00%	\$ -	\$ 2,759.72	\$ 1,481.11
59	Oak Park - Maze Branch		0.00%	\$ -	\$ 2,759.72	\$ 1,481.11
60	Orland Park	30852	4.35%	\$ 26,168.88	\$ 2,759.72	\$ 1,481.11
61	Palos Heights	10777	1.52%	\$ 9,141.12	\$ 2,759.72	\$ 1,481.11
62	Palos Park	3130	0.44%	\$ 2,654.89	\$ 2,759.72	\$ 1,481.11
63	Park Forest	13782	1.94%	\$ 11,689.99	\$ 2,759.72	\$ 1,481.11
64	Prairie State College	213	0.03%	\$ 180.67	\$ 2,759.72	\$ 1,481.11
65	Prairie Trails	11084	1.56%	\$ 9,401.52	\$ 2,759.72	\$ 1,481.11
66	Richton Park	5726	0.81%	\$ 4,856.83	\$ 2,759.72	\$ 1,481.11
67	River Forest	9924	1.40%	\$ 8,417.60	\$ 2,759.72	\$ 1,481.11
68	River Grove	1942	0.27%	\$ 1,647.22	\$ 2,759.72	\$ 1,481.11
69	Riverdale	2917	0.41%	\$ 2,474.22	\$ 2,759.72	\$ 1,481.11
70	Riverside	8542	1.20%	\$ 7,245.38	\$ 2,759.72	\$ 1,481.11
71	Schiller Park	1278	0.18%	\$ 1,084.01	\$ 2,759.72	\$ 1,481.11
72	South Holland	6616	0.93%	\$ 5,611.74	\$ 2,759.72	\$ 1,481.11
73	Steger-South Chicago Heights	3378	0.48%	\$ 2,865.24	\$ 2,759.72	\$ 1,481.11
74	Stickney-Forest View	2685	0.38%	\$ 2,277.44	\$ 2,759.72	\$ 1,481.11
75	Summit	1234	0.17%	\$ 1,046.69	\$ 2,759.72	\$ 1,481.11
76	Thomas Ford	12528	1.76%	\$ 10,626.33	\$ 2,759.72	\$ 1,481.11
77	Thornton	366	0.05%	\$ 310.44	\$ 2,759.72	\$ 1,481.11
78	Tinley Park	33633	4.74%	\$ 28,527.74	\$ 2,759.72	\$ 1,481.11
79	University Park	712	0.10%	\$ 603.92	\$ 2,759.72	\$ 1,481.11
80	Westchester	11627	1.64%	\$ 9,862.10	\$ 2,759.72	\$ 1,481.11
81	Westmont	13408	1.89%	\$ 11,372.76	\$ 2,759.72	\$ 1,481.11
82	William Leonard	73	0.01%	\$ 61.92	\$ 2,759.72	\$ 1,481.11
83	Woodridge	27133	3.82%	\$ 23,014.39	\$ 2,759.72	\$ 1,481.11
84	Worth	4201	0.59%	\$ 3,563.32	\$ 2,759.72	\$ 1,481.11
	Total	709979	100%	\$ 602,209.00	\$ 229,057.00	\$ 122,932.00

Appendix B: Container Count Statistics

Appendix B: Container Count Statistics p 1 of 2 (January – June 2010)

#	Library	6 Month Delivery Average	6 Month Delivery %
1	Acorn Public Library District	34125	1.58%
2	Alsip-Merrionette Park PLD	32933	1.53%
3	Bedford Park Public Library District	6825	0.32%
4	Beecher Community Library District	12242	0.57%
5	Bellwood Public Library	13217	0.61%
6	Berkeley Public Library	9317	0.43%
7	Berwyn Public Library	49508	2.29%
8	Blue Island Public Library	32933	1.53%
9	Bridgeview Public Library	24700	1.14%
10	Broadview Public Library District	12025	0.56%
11	Brookfield Public Library	20692	0.96%
12	Brookfield Zoo	1105	0.05%
13	Calumet City Public Library	37267	1.73%
14	Calumet Park Public Library	3250	0.15%
15	Chicago Heights Public Library	26000	1.20%
16	Chicago Ridge Public Library	18850	0.87%
17	Cicero Public Library	23617	1.09%
18	Clarendon Hills Public Library	11158	0.52%
19	Crestwood Public Library District	11267	0.52%
20	Crete Public Library District	30767	1.43%
21	Dolton Public Library District	24483	1.13%
22	Downers Grove Public Library	106167	4.92%
23	Eisenhower Public Library District	43333	2.01%
24	Elmhurst Public Library	104325	4.83%
25	Elmwood Park Public Library	29250	1.36%
26	Evergreen Park Public Library	31200	1.45%
27	Flossmoor Public Library	42250	1.96%
28	Forest Park Public Library	25892	1.20%
29	Frankfort Public Library District	49617	2.30%
30	Glenwood-Lynwood Library District	26650	1.24%
31	Grande Prairie Library District	29033	1.35%
32	Green Hills Public Library District	975	0.05%
33	Harvey Public Library District	11158	0.52%
34	Hillside Public Library	14517	0.67%
35	Hinsdale Public Library	40517	1.88%
36	Hodgkins Public Library District	9858	0.46%
37	Hometown Public Library	542	0.03%
38	Homewood Public Library District	66733	3.09%
39	Indian Prairie Public Library District	86233	4.00%
40	Justice Public Library District	10400	0.48%
41	La Grange Park Public Library District	32717	1.52%

Appendix B: Container Count Statistics p 2 of 2 (January – June 2010)

#	Library	6 Month Delivery Average	6 Month Delivery %
42	La Grange Public Library	39650	1.84%
44	Lansing Public Library	8233	0.38%
45	Lisle Library District	4442	0.21%
46	Lyons Public Library	8667	0.40%
47	Markham Public Library	4897	0.23%
48	Matteson Public Library	39650	1.84%
49	Maywood Public Library District	6500	0.30%
50	McCook Public Library District	8667	0.40%
51	Melrose Park Public Library	22642	1.05%
52	Midlothian Public Library	14733	0.68%
53	Nancy L. McConathy Library District	11050	0.51%
54	North Riverside Public Library District	10617	0.49%
55	Northlake Public Library District	23292	1.08%
56	Oak Lawn Public Library	77133	3.57%
57	Oak Park Public Library	105192	4.88%
58	Oak Park - Dole Branch	0	0.00%
59	Oak Park - Maze Branch	0	0.00%
60	Orland Park Public Library	75833	3.51%
61	Palos Heights Public Library	32283	1.50%
62	Palos Park Public Library	8342	0.39%
63	Park Forest Public Library	40300	1.87%
64	Prairie State College	3575	0.17%
65	Prairie Trails Public Library District	23292	1.08%
66	Richton Park Public Library District	15708	0.73%
67	River Forest Public Library	25133	1.16%
68	River Grove Public Library District	7692	0.36%
69	Riverdale Public Library	10292	0.48%
70	Riverside Public Library	21558	1.00%
71	Schiller Park Public Library	10942	0.51%
72	South Holland Public Library	18958	0.88%
73	Steger-So. Chicago Heights Library District	9750	0.45%
74	Stickney-Forest View Library District	8450	0.39%
75	Summit Public Library District	3792	0.18%
76	Thomas Ford Memorial Library	28817	1.34%
77	Thornton Public Library	3358	0.16%
78	Tinley Park Public Library	79950	3.71%
79	University Park Public Library District	3467	0.16%
80	Westchester Public Library	27192	1.26%
81	Westmont Public Library	36400	1.69%
82	William Leonard Public Library District	3250	0.15%
83	Woodridge Public Library	64783	3.00%
84	Worth Public Library District	11592	0.54%
	Total	2157718	100.00%

Appendix C: Current Location – Full Costs

Salaries & Wages & All Benefits	Cost	Notes
Delivery Staff	461,935	
Senior Accountant (25%)	16,974	Payroll, benefit administration
Total Salaries & Wages	478,909	
Building & Grounds		
Utilities	124,700	100% of MLS total
Property Insurance	12,750	100% of MLS total
Custodial Service & Supplies	15,400	100% of MLS total
Repairs & Maintenance	46,940	100% of MLS total
Other	12,460	100% of MLS total
Total Building & Grounds	212,250	Overhead
Vehicle Expense		
Gas	35,000	
Repairs & Maintenance	16,000	
Vehicle Insurance	8,800	
Other	750	
Total Vehicle Expense	60,550	
Liability Insurance	10,600	Overhead
Supplies, Postage & Printing		
Computer Supplies Under \$5,000	2,000	
Office Supplies	500	
Postage / Shipping	0	
Delivery Supplies	13,250	Totes, tubs, carts
Total Supplies, Postage & Printing	15,750	
Telephone & Telecommunications	6,207	Overhead - 20% of MLS total
Contractual Services		
Outside Printing	15,000	Routing stickers
Total Contractual Services	15,000	
Miscellaneous	2,000	
Capital Outlay		
Autos & Trucks	30,000	New truck every year
Total Capital Outlay	30,000	
<i>Subtotal Overhead</i>	<i>229,057</i>	
<i>Subtotal Operating</i>	<i>602,209</i>	
Total Expenditures	831,267	

Appendix D: Current Location – Share with SWAN Costs

Salaries & Wages & All Benefits	Cost	Notes
Delivery Staff	461,935	
Senior Accountant (25%)	16,974	Payroll, benefit administration
Total Salaries & Wages	478,909	
Building & Grounds		
Utilities	62,350	50% of MLS total
Property Insurance	6,375	50% of MLS total
Custodial Service & Supplies	7,700	50% of MLS total
Repairs & Maintenance	23,470	50% of MLS total
Other	6,230	50% of MLS total
Total Building & Grounds	106,125	Overhead
Vehicle Expense		
Gas	35,000	
Repairs & Maintenance	16,000	
Vehicle Insurance	8,800	
Other	750	
Total Vehicle Expense	60,550	
Liability Insurance	10,600	Overhead
Supplies, Postage & Printing		
Computer Supplies Under \$5,000	2,000	
Office Supplies	500	
Postage / Shipping	0	
Delivery Supplies	13,250	Totes, tubs, carts
Total Supplies, Postage & Printing	15,750	
Telephone & Telecommunications	6,207	Overhead - 20% of MLS total
Contractual Services		
Outside Printing	15,000	Routing stickers
Total Contractual Services	15,000	
Miscellaneous	2,000	
Capital Outlay		
Autos & Trucks	30,000	New truck every year
Total Capital Outlay	30,000	
<i>Subtotal Overhead</i>	<i>122,932</i>	
<i>Subtotal Operating</i>	<i>602,209</i>	
Total Expenditures	725,142	

Appendix E: Patron Hold Snapshot Formulas

Below are two formulas that can be used to develop a snapshot report of patron holds, i.e. patron accounts with holds on a given day. This snapshot could be used as support when trying to determine the impact of lowering hold limits.

Formula 1

Contact Christine Kuhn at Westmont PL with questions regarding this formula.

1. Search in Report Server
2. Type: Patron; Field: Hold; Condition: Exist
3. Type: Patron; Field: Home Libr; Condition:equal to wms
4. Type: Patron; Field:Pcode4; Condition : between (your pcode4s)
5. After the report is printed, look up each patron on MIL CIRC. A quick search shows # of holds on the HOLD tab.

Formula 2

Contact Jeannie Dilger-Hill at La Grange PL with questions regarding this formula.

1. In MilCirc, click on View Holds in the left-hand menu bar.
2. Choose your library for pickup location.
3. Click on "View Outstanding Holds"
4. The list can be sorted by patron name by clicking on "Patron Info."
5. Create a paper tally sheet using whatever thresholds you would like (0-9 holds, 10-19 holds, 20-29 holds, 30 or more holds, e.g.). Count how many holds each patron has and record them on the tally sheet.

Note: the View Holds list can be emailed to someone by printing to an email printer, but the list is actually easier to read and count on the screen.

Appendix F: Request for Information (RFI) for Outsourcing

Request for Information: Library Materials Delivery Service

Background Information: A group of public libraries in Illinois (hereafter referred to as “Affiliated Institutions”) is seeking proposals from prospective vendors to provide delivery of library materials between approximately 84 libraries, located in the south and near west suburbs of Chicago using regularly scheduled routes.

The estimated volume of items to be delivered is approximately 4.3 million annually. This number is subject to fluctuation.

Materials that will be delivered include (but are not limited to): books, CDs, DVDs, cassettes, videotapes, and printed matter.

A list of required delivery locations with the estimated annual volume for each is included as Appendix A in a separate attachment.

Proposals will be evaluated by a Committee comprised of representatives from the Affiliated Institutions.

The term of any resulting contract for service will be from January 1, 2011 through December 31, 2013. All answers and statements made by a vendor in the response to this RFI will be incorporated into the resulting contract between the Affiliated Institutions and the successful vendor.

TIMELINE

1. RFI issued: September 1, 2010
2. Responses due: October 1, 2010, 5:00 PM
3. Vendor selected & contract negotiations begin: November 1, 2010
4. Desired service start date: January 1, 2011

RFI Contact Person:

Megan Millen
Flossmoor Public Library
1000 Sterling Ave. Flossmoor, IL 60422
Telephone: 708-798-3600
Email: millenm@flossmoorlibrary.org

PROPOSAL RESPONSE

Submission of Proposals: Each proposal shall be submitted electronically via e-mail with attachments to the RFI Contact Person listed on page 1 of this RFI. Vendor's proposal shall consist of:

- One electronic file of the Technical Proposal,
- One electronic file containing the Cost Proposal,
- Additional applicable literature and other supporting documents may be attached as separate files

Receipt of all proposals will be confirmed by the RFI Contact Person within 24 hours.

The electronic submission of the proposal shall be followed by **one print copy of the proposal** that is signed by an authorized representative by original signature with his or her name and legal title typed below the signature line. The print copy of the response should include the Technical Proposal, applicable literature and other supporting documents, and the Cost Proposal. **The print copy of the proposal must arrive at the address listed on page 1 of this RFI no later than October 1, 2010.**

It is the vendor's responsibility to ensure bids are received by the closing date and time. Late proposals may not receive consideration.

INSTRUCTIONS

1. **Inquiries:** All inquiries, written or verbal, shall be directed only to the RFI Contact Person reflected on Page 1 of this proposal. Violations of this provision by vendor or interested parties may result in the rejection of the proposal.

2. **Committee Inquiries:** The Committee reserves the right to request information from vendors as needed. If information is requested, the Committee is not required to request the information of all vendors. No additional revisions shall be made after the specified cut-off time unless requested by the Committee.

3. **Cost of Preparing Proposal:** The cost of developing and submitting the proposal is entirely the responsibility of the vendor. This includes costs to determine the nature of the engagement, preparation of the proposal, submitting the proposal, negotiating for the contract and other costs associated with this RFI.

4. **Preparation of Proposal:** The Committee has the right to rely on any information and price quotes provided by vendors. The vendor shall be responsible for any mathematical error in price quotes. The Committee reserves the right to reject proposals which contain errors.

A proposal shall not be considered for award if the price in the proposal was not arrived at independently and without collusion, consultation, communication or agreement as to any matter related to price with any other vendor, competitor or interested party.

5. **Competition:** The purpose of this Request is to seek competition. The vendor shall advise the Committee if any specification, language or other requirement inadvertently restricts or limits bidding to a single source. Notification shall be in writing and must be received by the RFI Contact Person no later than five (5) business days prior to the bid closing date. The Committee reserves the right to waive minor deviations in the specifications which do not hinder the intent of this Request.

6. **Alternative Approaches:** Secondary, or alternative approaches and/or methodologies to accomplish the desired or intended results of this procurement are encouraged. However, proposals which depart materially from the terms, requirements, or scope of work defined in this procurement will be rejected as being non-responsive.

7. Evaluation of Proposals: Award shall be made in the best interest of the Affiliated Institutions as determined by the Committee. Although no weighted value is assigned, consideration may focus toward but is not limited to:

- Cost
- Adequacy and completeness of proposal
- Vendor's understanding of the project
- Compliance with the terms and conditions of the RFP
- Experience in providing like services
- Methodology to accomplish tasks
- Vendor's ability to provide the services required
- Vendor's qualifications and references
- Vendor's inclusion of alternates

Should the selected finalist and the Affiliated Institutions fail to reach agreement on contract terms and conditions, the Affiliated Institutions reserve the right to negotiate with one of the other vendors or to re-issue the RFI.

8. Acceptance or Rejection: The Committee reserves the right to accept or reject any or all proposals or part of a proposal; to waive any informalities or technicalities; clarify any ambiguities in proposals; modify any criteria in this Request; and unless otherwise specified, to accept any item in a proposal.

9. Proposal Disclosures: At the time of closing, only the names of those who submitted proposals shall be made public information. No price information will be released. Bid results will not be given to individuals over the telephone. Results may be obtained after contract finalization by obtaining a bid tabulation summary.

10. Exceptions: By submission of a response, the vendor acknowledges and accepts all terms and conditions of the RFI unless clearly avowed and wholly documented in a separate section of the Technical Proposal to be entitled: "Exceptions".

11. News Releases: Only the Affiliated Institutions are authorized to issue news releases relating to this Request, its evaluation, award and/or performance of the contract.

TECHNICAL PROPOSAL

Section 1: COMPANY INFORMATION

Qualifications: A description of the vendor's qualifications and experience providing the requested or similar service shall be submitted with the bid. The vendor must be an established firm recognized for its capacity to perform. The vendor must have sufficient personnel to meet the deadlines specified in the RFI.

Vendor Information: The vendor must include a narrative of the vendor's corporation and each subcontractor if any. The narrative shall include the following:

1. Provide a corporate profile describing your company, including the number of employees, the physical location of current operations offices, and whether drivers are company employees, subcontracted through another company, or individual subcontractors. Contractors and subcontractors must pay prevailing wage. See the following website for prevailing wage:

<http://www.state.il.us/agency/idol/rates/ODDMO/COOK9999.htm>

2. Provide a copy of your company's most recent available annual report or audited financial statement. If this information is considered proprietary and confidential, please indicate so on the first page of the financial statement.

3. List all of the states in which you currently provide service.
4. Describe your company's experience with route services, courier services or related delivery services, including both library and other types of customers if possible. A minimum of three (3) years of experience in providing service of a scope similar to this procurement is preferred.
5. Provide a certification of insurance and liability for no less than \$10,000,000. Also, provide proof that contractors and subcontractors are licensed and bonded.
6. Provide the names of the key officers and managers, as well as the name of the primary customer service representative who would be assigned to this contract. Provide a brief description of work experience for each.
7. Please provide three (3) references from current customers including address, contact name, e-mail address and phone number. These references will be contacted before a short list of vendors is selected to make in-person presentations.

Section 2: SCOPE OF WORK

For each of the numbered items below, **please answer "yes" or "no"** as to whether your company can comply with the stated requirement. If your company cannot comply, please provide a brief explanation. Vendors should also feel free to elaborate on how tasks will be accomplished.

Route Logistics

1. The vendor must provide delivery and pickup service to all of the location addresses listed in Appendix A to a designated location within each building. Please note that this list of addresses is preliminary and other locations may be added or a physical address changed with two week notice.
2. The vendor must be able to provide scheduled service five days a week (Monday through Friday) to specified locations (see Appendix A).
3. The vendor must stop at each location on every day it is scheduled for delivery and pickup regardless of whether or not the driver has any packages or containers to deliver.
4. The vendor must provide delivery and pickup of material at any particular location at the same time every day the location is scheduled for service, within a one hour window.
5. The vendor must be able to stop delivery to all locations according to a list of scheduled holidays provided in advance at the beginning of each contract year. These would likely include New Year's Day, Memorial Day, Fourth of July, Labor Day, Thanksgiving Day and Christmas Day.
6. The vendor must be able to stop delivery to accommodate scheduled closings at individual libraries according to a list provided in advance at the beginning of each contract year.
7. The vendor must be able to stop delivery to accommodate an emergency closing at an individual location with 12 hour notice.

Administration and Customer Service

8. The vendor must devise and manage an agreed upon schedule of deliveries and provide a mechanism for handling schedule changes and missed deliveries.
9. The vendor must organize and manage routes, as well as the transfer of materials between routes.
10. The vendor must furnish commercial motor trucks, sufficient in size and power to transport without damage, daily volumes to be delivered. Trucks must readily accommodate an on-board/on-route sorting service as described in this document. The vendor's delivery vehicles must be covered and protected from the elements. The vendor must also furnish sufficient back-up vehicles to insure uninterrupted delivery service.

11. The vendor must furnish personnel sufficient to provide delivery service and on-board/on-route sorting service as described in this document. The vendor must also furnish sufficient route and procedure-trained back-up drivers to insure uninterrupted delivery service.
12. The vendor must be responsible for training and orientation of drivers and sorters. The vendor will arrange that up-to-date route manifests, delivery and sorting procedures, and routing directories be readily available for drivers and /or sorters.
13. The vendor must provide a single primary customer service representative assigned to this contract who will handle all service issues, including missed stops, scheduled changes, expected materials that have not been delivered, damaged or lost materials and other service issues that may arise.
14. The vendor must provide a designated contact person for resolution of questions relating to invoicing, payment, and damaged/lost materials claims.
15. The vendor must resolve any service problems, such as missed stops, within one (1) business day.
16. The vendor must provide a damaged and lost materials claim procedure. If problems are to be reported electronically, please supply a website URL and trial login for the purposes of this response.

Driver Requirements

17. The vendor must conduct basic background checks on all company employed or subcontracted drivers, specifying that they have active driver's license and no felony convictions.
18. Every vendor employee or subcontractor delivering to a location must display visible identification such as a standard uniform, tag or badge which clearly identifies the individual as a representative of the vendor.
19. Drivers must initial a statistical record provided at each location for every stop indicating the date, time, and number of items delivered and/or picked up at each stop.
20. Drivers must behave in a courteous manner and exhibit a presentable appearance at all times when on the premises of each location.

Performance Requirements

21. The vendor must deliver packages or containers between locations receiving five days per week service within two (2) business days, excluding weekends and holidays, in 90% of cases and no later than three (3) business days in 100% of cases.
22. The vendor must provide the following statistics on a quarterly basis:
 1. volume based on number of packages or containers
 2. other measures as mutually determined

Responsibility

23. The vendor must be responsible for and must hold harmless the Affiliated Institutions from any damage done by the contractor or any subcontractor, to any person, corporation or property.
24. The vendor must be responsible for the care and handling of the materials. Materials are to be protected from inclement weather and are to be handled with care.
25. The vendor will be held liable for damage to materials for which there is substantial proof of negligence on the part of the drivers and/or sorters.

Alternates

26. Material picked up each day is to be sorted on route, so that items picked up and labeled for subsequent stops on the route will be delivered the same day. Items labeled for stops already made will be returned to the vendor's facilities and sorted for delivery the next working day. See Appendix B.
27. The vendor must supply an adequate number of containers to libraries so they can pack deliveries in standard-sized containers.

COST PROPOSAL

Cost Proposal shall include

- proposed annual cost of service
- an explanation of how the total cost was determined (e.g. stops, weight, number of packages, locations, etc.)
- any multi-year contract discounts
- payment schedule and methods preferred
- proposed cost of alternates
- cost adjustments for adding or deleting any stops
- any fuel surcharges

Appendix A: DELIVERY LOCATIONS and MAP

ID	Library	Average Weekly Volume delivered and returned
1	Acorn Public Library District	1,327
2	Alsip-Merrionette Park PLD	1,320
3	Bedford Park Public Library District	358
4	Beecher Community Library District	510
5	Bellwood Public Library	525
6	Berkeley Public Library	421
7	Berwyn Public Library	2,015
8	Blue Island Public Library	1,296
9	Bridgeview Public Library	979
10	Broadview Public Library District	485
11	Brookfield Public Library	894
12	Brookfield Zoo	38
13	Brookwood El. School District #167	12
14	Calumet City Public Library	1,458
15	Calumet Park Public Library	125
16	Chicago Heights Public Library	1,013
17	Chicago Ridge Public Library	767
18	Cicero Public Library	958
19	Clarendon Hills Public Library	588
20	Crestwood Public Library District	471
21	Crete Public Library District	1,167
22	Dolton Public Library District	392
23	Downers Grove Public Library	4,138
24	Eisenhower Public Library District	971
25	Elmhurst Public Library	4,173
26	Elmwood Park Public Library	1,110
27	Evergreen Park Public Library	1,263
28	Flossmoor Public Library	1,779
29	Forest Park Public Library	1,038

30	Frankfort Public Library District	1,958
31	Glenwood-Lynwood Library District	1,063
32	Grande Prairie Library District	1,100
33	Green Hills Public Library District	34
34	Harvey Public Library District	473
35	Hillside Public Library	573
36	Hinsdale Public Library	1,600
37	Hodgkins Public Library District	463
38	Hometown Public Library	21
39	Homewood Public Library District	2,525
40	Indian Prairie Public Library District	3,296
41	Justice Public Library District	450
42	Kirby El. School District #140	79
43	La Grange Park PLD	1,429
44	La Grange Public Library	1,638
45	Lansing Public Library	403
46	Lisle Library District	198
47	Lyons Public Library	427
48	Markham Public Library	178
49	Matteson Public Library	1,525
50	Maywood Public Library District	371
51	McCook Public Library District	435
52	Melrose Park Public Library	950
53	Midlothian Public Library	563
54	Nancy L. McConathy PLD	467
55	North Riverside PLD	454
56	Northlake Public Library District	958
57	Oak Lawn Public Library	3,008
58	Oak Park Public Library	4,165
59	Orland El. School District #135	10
60	Orland Park Public Library	3,042
61	Palos Heights Public Library	1,275
62	Palos Park Public Library	396
63	Park Forest Public Library	1,563
64	Prairie State College	133
65	Prairie Trails Public Library District	921
66	Richton Park Public Library District	600
67	River Forest Public Library	1,031
68	River Grove Public Library District	400
69	Riverdale Public Library	446
70	Riverside Public Library	827
71	Schiller Park Public Library	467
72	South Holland Public Library	733

73	Steger-So. Chicago Heights Library District	435
74	Stickney-Forest View Library	398
75	Summit Public Library District	152
76	Thomas Ford Memorial Library	1,225
77	Thornton Public Library	129
78	Tinley Park Public Library	3,133
79	University Park PLD	129
80	Westchester Public Library	1,058
81	Westmont Public Library	1,479
82	William Leonard PLD	121
83	Woodridge Public Library	2,571
84	Worth Public Library District	473
	Total	85,542

A map of the above libraries is located at: <http://www.communitywalk.com/MLSPublics>

Appendix B: REQUIRED ELEMENTS FOR SORTING SERVICE

The following items must be provided as part of the sorting service and pricing proposed:

1. Vendor must be responsible for sorting containers and delivering to each of the participating locations the following workday.
2. All sorting processes must be based out of vendor's indoor facilities.
3. All incoming materials must be processed for inclusion in the next business day's outgoing delivery. Incoming materials will include materials picked up from physical delivery service at all libraries.
4. Vendor must include information regarding the type and size of container to be used.
5. Vendor must include information regarding the type of labeling to be used by participating locations. If this is to be a computer-generated label, information must be included regarding the software and hardware required.
6. If location codes are to be assigned, please describe the system you recommend using.
7. Sorting must be 99% accurate. Describe how you will ensure such a high level of accuracy.