

Proposal

In Response to:
Request for Quote (RFQ)
March 31, 2017
Automated Authorities Processing &
Ongoing Authority Control Processing for
Missouri Evergreen Libraries

Prepared By:
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March 31, 2017

Sue Crites Szostak
Director
Poplar Bluff Municipal Library
318 North Main Street
Poplar Bluff, MO 63901

Dear Ms. Szostak:

Thank you for the opportunity to respond to **The Missouri Evergreen Libraries Request for Quotes (RFQ), Project Title: Automated Authorities Processing**. Backstage Library Works (Backstage) understands the Library's need for Authority Control processing in an effort to provide more consistent and efficient service to the Library's patrons. Backstage is pleased to offer our complete solution.

With over 25 years of experience in providing professional services to libraries worldwide, we are well positioned with a wealth of experience and talent to propose this solution. Backstage specializes in providing services to the library community, such as on-site services, cataloging, authority control and other bibliographic services, as well as digitization and preservation microfilming services. Over the years, many prestigious and complex library systems such as MOBIUS Consortium, Mississippi State University and Stanford University have entrusted us to meet their unique Authority Control needs. Backstage is committed to providing quality service while being flexible in finding creative solutions to our clients' needs. Our experiences have given us a special view of the specific needs and requirements of the library community.

We believe in the high level of service we provide; therefore, all our work comes with our ironclad quality guarantee. ***All work done by Backstage Library Works is delivered with our exclusive lifetime guarantee. We will correct to the client's satisfaction, and at our expense, any problem with our services, no matter when such problem comes to light.***

If you have any questions regarding this solicitation response, please contact your account representative, Beth Ann Goodwill, at (800) 288-1265 or at bgoodwill@bslw.com. We thank you again for this opportunity to offer our services and look forward to hearing from you.

Best wishes,



John Merrill
President, Backstage Library Works

**Backstage Response to Request for Quote (RFQ),
Automated Authorities Processing and Ongoing Authority Control Processing
for Missouri Evergreen Libraries**

Following is a detailed description of Backstage’s practices, methods, tools and technologies as well as our customer support approach and contact information in response to the RFQ specifications. Backstage acknowledges all information and requirements as outlined in the RFQ.—including Company History and References; Timeline and Schedule; Pricing; Acknowledgement of Meeting Mandatory Specifications; and Appendix A – Price Quote; and confirms our ability to fulfill all of these requirements and to comply with each subsection.

Please note: To demonstrate a complete response in the order requested by The Missouri Evergreen Libraries, this proposal quotes the original RFP language in **BLACK TEXT** and provides specific acknowledgements to the requirements as well as a description of proposed services in **BLUE TEXT**.

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Company History and References

With over 25 years of experience in providing professional services to libraries worldwide, Backstage Library Works is well positioned with a wealth of experience and talent to provide a solution. Choosing Backstage for authority control support will ensure that the reliable authorities processing, excellent customer service, quick turnaround, and custom-fitted solution that our clients receive will become a part of Missouri Evergreen Libraries future success.

Backstage's MARS Authority Control service stands apart in the market due to several key aspects that demonstrate our dedication to technological advances and customer service:

- Deep customization of both the regular Authority Control processing and RDA enrichment services
- Online profiles and corresponding wikis, with multi-user support
- Detailed planning guides available in PDF or print
- Access to over 60 reports, keeping the library informed about the entirety of its processing
- Personal service, listening to clients' needs and creating solutions to meet your expectations

Backstage's Authority Control services are supported by an especially qualified team of programming, production, editing, and sales staff, and backed by the latest technology. We will work with you to meet the exact specifications required for managing your database on an ongoing basis.

Experience

Backstage was selected in 2010 as one of three vendors to participate in the original Library of Congress (LC) sponsored RDA testing phase. Since that time, Backstage has developed an exhaustive set of RDA enrichment options to handle client requests for conversion of their non-RDA records to include RDA elements. To date, Backstage has enriched more than 100 million bibliographic records with RDA elements, which accounts for over 100 clients. In response to existing customers, Backstage decided to keep RDA enrichment options in a separate online profile to treat RDA and non-RDA records separately, if desired.

Backstage's objective is to provide the most technologically advanced and efficient means for delivering bibliographic services in the industry. Our work is distinguished from other contractors because:

- it is fully customizable,
- we offer a wide variety of services, and
- we believe that communication is crucial to a successful project.

We maintain a high level of communication with our clients to both safeguard against potential misunderstandings and to guarantee our clients receive the services they request in the most satisfactory manner. To achieve this high level of communication, Backstage assigns responsibility for each project to a dedicated project manager who serves as main point of contact for the duration of the project. This person oversees the day-to-day activities of your project, provides weekly updates on

the status of the project, and highlights any issues that arise. The Project Manager for Missouri Evergreen Libraries is Ms. Casey Cheney.

Project Manager - Casey Cheney, PMP

Casey started her career with Backstage in 2003, serving in various roles that require deep knowledge of industry standards and focused attention to detail. After serving as Cataloging Project Manager in Backstage's Metadata Services department, she joined Automation Services as Authority Control Project Manager in early 2016. Prior to this, Casey began copy and original cataloging in 2004 and has cataloged multiple formats in English, German, Spanish, and Russian.

She served as Retrospective Conversion Project Manager, Cataloging Project Manager, and Reclassification Project Manager for a total of 9 years. Casey has also participated in Backstage's NACO training program to allow Backstage to become an independent contributor. She received her PMP certification in December 2015.

In her new position, Casey is responsible for managing authority control projects after contracts have been awarded. She works with sales, automation services, and programming teams to ensure that projects are scheduled, properly set up, and successfully executed according to contract specifications. Casey also troubleshoots issues and develops solutions through client interaction, as well as maintaining authority control and RDA enrichment documentation.

Casey and our team will provide not only great quality service, but efficient and rapid project completion.

Backstage takes an active role in the library community, regularly participating in professional development and in the creation of industry standards. Backstage is an active corporate member of the American Library Association and its ALCTS division, and our Librarians are involved with the PCC, NACO, SACO, and CONSER. Most recently, Backstage was the only vendor invited by the PCC BIBFRAME Task Group to help map BSR to BIBFRAME. Backstage also maintains relationships with database providers, such as OCLC, SkyRiver and RLUK, in order to provide our clients with a variety of options for copy cataloging resources.

Backstage has many years working directly with consortia, managing and maintaining their collections through our authority control service. Some consortia, such as MOBIUS (see reference below), choose to operate independently and send in each cluster library's files separately. Other consortia, such as Suffolk Cooperative Library System (see reference below), choose to collate all of their records together and send one file to Backstage for processing. We can accommodate any workflow that is most convenient for Missouri Evergreen Libraries.

References

Consortia customer

Christopher A Gould

Systems Librarian

MOBIUS Swan ([info](#))

christopher@mobiusconsortium.org

573-777-2624

III - Millennium

1,832,474

Longtime customer (6 years or more)

Stephen Cunetto

Administrator of Systems

Mississippi State University ([info](#))

scunetto@library.msstate.edu

662-325-8542

SD - Symphony

1,861,392

New customer (within last 6 months)

Debi Groh

Union Catalog Manager

Suffolk Cooperative Library System ([info](#))

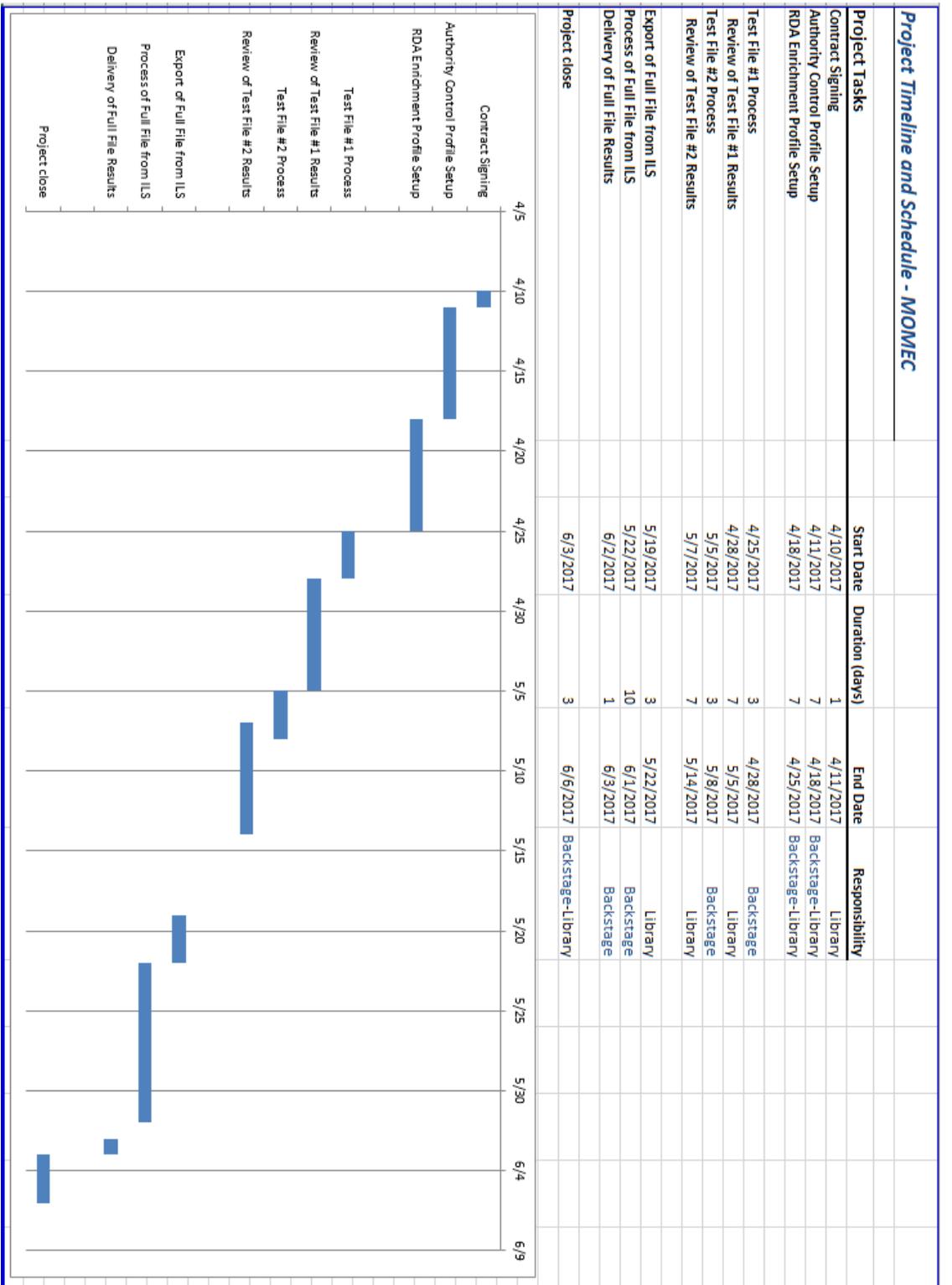
dgroh@suffolknet.org

631-286-1600

III

1,563,024

Timeline



Submission of Pricing

See Appendix A for the itemized price quote

Pricing

Service:	Price per record	Total:
Basefile processing of 1,300,000 records Includes profiling and 1,000 record test sample	\$0.022	\$28,600.00
Record Enhancements: RDA Enrichment Services when done in conjunction with our standard Authority Control base file service	Included	Included
URI Enrichment in \$0 field on the end of access points in bib records when done in conjunction with our standard Authority Control base file service	Included	Included
Lexile Enrichment full base file. Max project total \$5000.00	\$0.007	\$5000.00
AR Enrichment when done in conjunction with our standard Authority Control base file service	Included	Included
TOC Enrichment, per records enriched:		
Using the LC bib database for relevant matching information, for <i>one or more</i> available enrichments	\$0.25	
Using the Bowker bib database for relevant matching information, for <i>one</i> enrichment	\$0.49	
Using the Bowker bib database for relevant matching information, for <i>two</i> enrichments	\$0.70	
SEARS Headings Enrichment: We do not have this capability at the current time, but we would be happy to explore it with the Library	TBD	TBD
Current Cataloging Service \$250.00 minimum batch fee Non electronic resource bib records	\$0.06	\$18,180.00

Current Cataloging Service Electronic resource bib records	\$0.04	\$1,800.00
*****	*****	*****
Ongoing Maintenance Services: Frequency of Updates per 12 months. Options (choose one)	Cost per Update	Annual Cost
Annual - 1 unit	\$4320.00	\$4320.00
Semi-annual - 2 units	\$2160.00	\$4320.00
Quarterly - 4 units	\$1080.00	\$4320.00
Monthly - 12 units	\$ 515.00	\$6180.00
Weekly - 52 units	\$ 118.85	\$6180.00
Lifetime Quality Guarantee: <i>All work done by Backstage Library Works is delivered with our exclusive lifetime guarantee. We will correct to the client's satisfaction, and at our expense, any problem with our services, no matter when such problem comes to light.</i>		Included

PRICING CONDITIONS AND OTHER PROVISIONS:

1. All prices are in US dollars.
2. Prices are based on client's best estimate of the total number of records to be converted. Final billing reflects the actual number of records processed.
3. Proposal pricing is valid until date specified above. Upon approval by signature, pricing is valid for the duration of the project.
4. Backstage Library Works and the Library will discuss profiling.
5. Preferred payment plan: Invoiced upon project completion. Payment due net 30 days.
Note: Payment plans are available upon request.
6. All taxes, if any, are the responsibility of the Library.

Backstage Library Works acknowledges that it complies with all required specifications in this Request for Quote.

Appendix A



QUOTE FOR AUTHORITY CONTROL SERVICES

March 31, 2017	Project: Authority Control Processing, Optional RDA Enrichments, On-going Processing		
MOBIUS Evergreen Consortium 111 E Broadway Suite 220 Columbia, MO 65203	Description: The Library has 1,300,000 bibliographic records in their database. Approximately 348,000 new bibliographic records are added each year. Authority notification updates will be performed at quarterly intervals.		
Sue Crites Szostak Chair, Director 507-389-5791 szostak@poplarbluff.org			
Basefile Service & RDA Enrichments	Unit Price	Units	Extended Price
Backstage Library Works provides Basefile Authority Control for all bibliographic records currently in your catalog. Basefile processing includes updates and corrections of your MARC records and matching of bibliographic headings against any or all of the following databases:			
<ul style="list-style-type: none"> • Library of Congress: Name/Subject Authority File • Library of Congress: Children's Authority File • National Library of Medicine: Medical Subject Headings (MeSH) • Library and Archives Canada: Canadiana Authority File • Library and Archives Canada: Canadiana Subject Authority File 			
In addition to name and subject heading updates, series and uniform title headings will be updated. Backstage will return updated bibliographic records and their associated authority records to the Library.			
Also included with the authority control basefile is Backstage's RDA Enrichment Service , which upgrades current non-RDA (i.e., lacking 040 \$e rda) bibliographic records to RDA standards. Backstage will re-describe the record as RDA in an automated fashion to whatever degree the Library indicates in their profile and offers options for authority control processing of RDA records at no additional cost.			

One-time setup fee (includes profiling and 1,000-record test)	\$500.00	1	\$500.00
Authority control processing, per bibliographic record	\$0.022	1,300,000	\$28,600.00
* Pricing is valid within 10% of estimated record count			
Output of authority files			INCLUDED
Quality verification testing			INCLUDED
FTP transfer, online client interface transfer or production of database media			INCLUDED
Shipping costs, if any			ACTUAL
Total Estimated Basefile Cost			\$29,100.00
Ongoing Authority Control Services			
	Unit Price	Units	Extended Price
Ongoing authority control services help maintain your authority work and are contracted for on a yearly basis. Ongoing services are customizable. Special requests may be accommodated.			
One-time setup fee (waived with basefile processing)	\$250.00	1	WAIVED
Current Cataloging Service			
The Backstage Current Cataloging Service is authority control for your new bibliographic records. They may be submitted in batches on whatever schedule you prefer. Deliverables include bibliographic records upgraded by authority control processing, authority records not already in your authority file that match the headings in your new bibliographic records, and authority records previously distributed that have been updated by the Library of Congress.			
Periodic Batch Processing			
<i>Schedule daily, weekly, monthly, quarterly, semiannually, or annually. Minimum charge, \$250 per batch.</i>			
Per bibliographic record	\$0.06	303,000	\$18,180.00
Per bibliographic e-record	\$0.04	45,000	\$1,800.00
Authority Control Notification Service			
The Backstage Authority Control Notification Service keeps your authority files up to date by periodically checking your records against current editions of the authority databases you've chosen. When authority records are updated, replaced, or deleted, Backstage will alert you of the changes and supply the updated records. Because they serve complementary functions, we recommend the Notification Service be used in conjunction with the Current Cataloging Service.			
These prices are based on a database size between 1,500,001 and 2,000,000 bibliographic records.			

Notification Service, weekly		\$118.85	52	\$6,180.00
Notification Service, monthly		\$515.00	12	\$6,180.00
Notification Service, quarterly		\$1,080.00	4	\$4,320.00
Notification Service, semi-annually		\$2,160.00	2	\$4,320.00
Notification Service, annually		\$4,320.00	1	\$4,320.00
Total Estimated Ongoing Services:				\$24,300.00

Comprehensive Quality Guarantee

All work performed by Backstage Library Works is delivered with our exclusive lifetime guarantee. We will correct to the client's satisfaction, and at our expense, any problem with our services, no matter when such a problem

INCLUDED

TOTAL ESTIMATED PROJECT COST \$53,400.00

PRICING CONDITIONS AND OTHER PROVISIONS:

1. All prices are in US dollars.
2. Prices are based on client's best estimate of the total number of records to be converted. Estimates that differ more than 10% may require an updated price per record. Final billing reflects actual number of records processed.
3. Proposal pricing is valid for 90 days. Upon approval by signature, pricing is valid for the duration of the project up to 12 months from date of quote.
4. Backstage Library Works and the Library will discuss profiling.
5. Preferred payment plan: Invoiced upon project completion. Payment due net 30 days.
6. All taxes, if any, are the responsibility of the Library.

The parties agree to the attached proposed pricing.

For MOBIUS Evergreen Consortium:		For Backstage Library Works:	
Signature		Signature	
Print Name		Ryan Myntti	
Title		Controller	
Date		Date	

Please return to the Backstage Library Works Corporate Office, attention Beth Ann Goodwill.

Fax to [801.356.8220](tel:801.356.8220) or scan and email to: bgoodwill@bslw.com; if an original signature is required, mail to:

Backstage Library Works • 25 East 1700 South • Provo, UT 84606

Appendix B

Backstage Library Works utilize an online client profile allowing the consortia to select their default processing specifications and exceptions:

<http://ac.bslw.com/mars>

Username and Password:

tmomec1

Once specifications are set we run a sample of your records against the default selections.

Backstage wiki:

http://ac.bslw.com/community/wiki/index.php/Main_Page

Backstage Authority Control Planning Guides:

<http://ac.bslw.com/mars/guide/>