SINGLE SOURCE AWARD **BID # SS-13325-23**

SUBJECT: Access to OCLC Database for Cataloging, Inter-Library Lending & Services

DEPARTMENT: Library

DESCRIPTION OF PURCHASE: Recommend approval of single source award to Online Computer Library Center, Inc. (OCLC) for access to the OCLC database for cataloging, inter-library lending and reference services. Period of service is from date of award through November 30, 2023. Total expenditure amount not to exceed $132,447.26 for FY23.

FUNDING SOURCE: 00111.185102.546620.000000.00000000.00000.0000000 – To be encumbered by purchase order

SINGLE SOURCE AWARD TO: OCLC Cataloging and Interlibrary Loan Services

PRICE JUSTIFICATION: See Attached

TOTAL AWARD: $132,447.26 **Requisition #:**

ATTACHMENTS: Recommendation Memo, Single Source Form, Vendor Quote and Previous Awards

CERTIFICATION AS TO SINGLE SOURCE: Gretchen Mitchell, Deputy Director, Jacksonville Public Library

THE ABOVE PURCHASE IS RECOMMENDED FOR AWARD IN ACCORDANCE WITH CHAPTER 126.206.

Analyst: Corey Sidlo

for Dustin Freeman, Chief
Procurement Division

APPROVAL OF GENERAL GOVERNMENT AWARDS COMMITTEE

"ALL AWARD ACTIONS SUBJECT TO LAWFULLY APPROPRIATED FUNDS"

CHAIRMAN ***DATE***

ACTION OF AWARDING AUTHORITY DATE: _____

APPROVED_____ DISAPPROVED _____

OTHER _____

SIGNATURE OF AUTHENTICATION _____

JACKSONVILLE
PUBLIC LIBRARY

Jacksonville Public Library
Support Services Department
3435 University Blvd. North
Jacksonville, Florida 32277

October 5, 2023

MEMORANDUM

TO: Dustin Freeman
Chief of Procurement

FROM: Stephanie Miller
Senior Manager of Library Collections

CC: Tim Rogers
Library Director

Gretchen Mitchell
Deputy Director for Support Services

Leslie Jones
Assistant Director of Library Finance

SUBJECT: Justification Letter for OCLC Cataloging and ILL Services
00111.185102.546620.000000.00000000.00000.0000000

The Jacksonville Public Library requests a purchase order in the amount of $132,447.26 for our annual subscription to OCLC Cataloging and Interlibrary Loan Services. The OCLC services requested provide the cataloging and interlibrary loan programs which enable the library to provide bibliographic description and classification for the materials held at the library. The services also allow us to loan material to other libraries.

The OCLC database contains over 336 million records with 2.2 billion cataloged items and is the world's largest bibliographic database covering 72,000 libraries of all types throughout the world. OCLC makes the information about the library and copy holdings of its member libraries available globally through its online database. OCLC is the sole provider of these databases and its services.

In providing cataloging and interlibrary loan services for the library the vendor must provide the following:

- Access to database of metadata for bibliographic, music, video and rare titles that is compiled from authoritative sources such as public and academic libraries, the Library of Congress and partner vendors.
- Ability to contribute, edit and export metadata records to our local integrated library system using the MARC 21 record format.
- Ability to maintain holdings of items that indicate ownership or inclusion in the Library's collection and its availability for lending to other libraries.

With your approval, the library requests to purchase the OCLC services on the qualifications outlined above. Any other vendor must meet these specified qualifications and requirements in order to be approved to provide this type of service.

Willey, Jessica

From: Miller, Stephanie
Sent: Tuesday, October 4, 2022 12:42 PM
To: JPLFinance
Cc: Bumbalough, Heather; Jacobson, Lynn; Mitchell, Gretchen
Subject: FY 23 OCLC request - urgent
Attachments: FY 23 OCLC justification letter - signed.pdf; Jacksonville Public Library (JPL) 20220928 SOLE SOURCE LETTER (WorldShare Metadata Cataloging and WorldShare ILL).pdf; OCLC_Justification for Single Source.docx; OCLC_Standard Requisition FY 23.pdf; Sales Order_1000124463.pdf

Importance: High

Hello all,

Please see attached documents for FY 23 OCLC PO request. This one is a Single Source request and will need to go to Governmental Awards.

Let me know if there is anything else I need to send.

Thank you,

Stephanie

Stephanie Miller, Senior Manager of Library Collections
Jacksonville Public Library
3435 University Blvd N. 32277
O: (904) 255-6185
E: sstokes@coj.net

Please note that under Florida's very broad public records law, e-mail communications to and from city officials are subject to public disclosure.

FINANCE & ADMINISTRATION DEPARTMENT, PROCUREMENT DIVISION

JUSTIFICATION FOR SINGLE SOURCE (JSS)	
Pursuant to the City of Jacksonville Procurement Code§ 126.206 & § 126.312, when requesting a purchase from a vendor subject to the referenced sections, please complete this form to justify your request and submit to Procurement with applicable attachments.	
1. Requesting Agency:	Library
2. Nature and/or description of the requirement being requested. ***Identify each item, component or service being procured. (Attach quote/proposal):*** ***Why does the City need these particular goods or services?***	Annual subscription to cataloging and interlibrary loan services through OCLC. Access to the OCLC database provides metadata to over 336 million titles which can be used for cataloging of items owned by the library as well as items loaned to and from other library in the country.
3. Provide a detailed justification as to why the requested goods/services can only be efficiently and effectively procured through the recommended Single Source vendor:	OCLC is the only provider of a database of bibliographic metadata that provides access to over 336 million records held by more than 72,000 libraries. As a contributing member the Jacksonville Public Library adds data unique to our collection and benefits from data contributed by other libraries making the cataloging of library material more efficient. In addition, as a member library our library customers can borrow material from other member libraries through out the country.
4. Date of Request	10/5/2022

5. Summary of Market Research

[Provide a description of the market research performed, how it was performed, by whom, and market research results. Please spell out acronyms.]

[Library staff have not found another satisfactory authorized source for this service.]

6. Other Documentation (Check and attach all that apply)

√ Supplier Quote

√ Single Source Memo signed by Director

√ Other [Single source justification letter from the vendor]

Jacksonville Public Library Standard Requisition Form

Use this form for all purchases under $65,000. When completed send form and supporting documentation (quotes, Sole Source/Proprietary documentation, justification letters etc.) through your chain of command for signatures, with final delivery to JPL Finance. The signed documents can be scanned for delivery to JPL Finance. Contact JPL Finance for requests above $65,000. If this is a Single Source request you must provide a written justification with written qoute/ proposal that a purchase can be made only from one justifiable source without competition. (Procurement Manual; Single Source)

Requested By: Stephanie Miller Date: 10/5/2022 Phone:904-2556185

Requesting Division: Support Services Branch/Other: Cataloging

- [ ] Regular Purchase Order
- [ ] City Credit Card Purchase
- [ ] Check Request
- [x] Single Source
- [ ] Request Foundation Card
- [ ] Foundation Purchase Order

Amount: $ 132,447.26 Funding Source: 00111 185102 - Main Library & Branches

Cost not to Exceed: $ (P-Card Only) Grant/Project Name/ #:

Account: 546620 - Hardware/Software Maint & Lic

Supplier Name: OCLC

Summary of the Scope of goods/services to be provided, List each item, component or service and **attach quote, proposal or work specifications**:

Annual subscription for OCLC cataloging and interlibrary loan services.

- [x] Vendor in attached quote/estimate is Registered in 1Cloud.
- [x] **Justification Letter Attached**. Required for Single Source purchase per Procurement Manual.

Signature Approvals: Type Name and send to appropriate person for signature.

Supervisor: Stephanie Miller Signature Stephanie Miller Digitally signed by Stephanie Miller Date: 2022.09.28 11:05:03 -04'00' Date: 10/5/2022

Division Dir. Gretchen Mitchell Signature Gretchen Mitchell Digitally signed by Gretchen Mitchell Date: 2022.10.03 13:53:16 -04'00' Date: 10/5/2022

Library Finance Leslie Jones Signature Leslie Jones Date: 10/7/2022 ~~10/5/2022~~

10-7-2022

Finance Use Only

Renewal

OCLC Symbol
JPL
Customer ID
46349

Currency
USD
Renewal Period
12/01/2022 to 11/30/2023

Renewal Order
1000124463
9/01/2022

Participant Library

Jacksonville Public Library

Jacksonville Public Library
Lynn Jacobson
Support Services
3435 University Blvd N
Jacksonville FL 32277
United States

3435 University Blvd N
Jacksonville FL 32277
United States

Item Code	Item	Amount
3000030	Cataloging and Metadata Subscription	$118,068.17
3000065	WorldShare ILL	$14,379.09
	Total USD	**$132,447.26**

THIS IS NOT AN INVOICE. An invoice will follow in the usual billing cycle.

We appreciate your subscription to OCLC services and hope you are pleased with the service and the support you have received during the past year. Your subscription(s) will automatically renew on 12/1/2022.

If you wish to continue your subscription as is, with no changes, no action is required by you at this time. If you wish to change or cancel your subscription(s) please contact OCLC Order Services at orders@oclc.org. Your renewal order number is 1000124463. If your institution requires a PO, please provide the new details to OCLC prior to your renewal date.

PLEASE NOTE: we require written confirmation for cancellation requests at least 30 days before your subscription renews on 12/1/2022.

If you have any questions about this service or need help using it, please contact OCLC support in your region at http://oc.lc/support.

Thank you
OCLC Order Services

* Please note prices are current as of the date of this notice and are subject to change.

This transaction is subject to the relevant OCLC Framework Agreement ("FA") and the Schedules related to each product listed on this notice, found at: http://oc.lc/service-agreements, unless a signed agreement governing the transaction has been entered into by the parties.

OCLC • 6565 Kilgour Pl Dublin OH 43017-3315 United States • +1-800-848-5878 • +1-614-764-6000 www.oclc.org

OCLC

Via e-mail: LynnJaco@coj.net

2022 September 28

Stephanie Miller, Senior Manager of Library Collections
Jacksonville Public Library (JPL)
3435 University Blvd. N.
Jacksonville, Florida 32277-2464

RE: Sole Source Request

Dear Ms. Miller,

Thank you for your recent inquiry concerning the availability of the following OCLC, Inc. ("OCLC") services: WorldShare Metadata OCLC Cataloging and WorldShare ILL (collectively the "OCLC Services").

OCLC is the only source from which the Jacksonville Public Library may obtain these OCLC Services.

OCLC looks forward to being of continued service to the Jacksonville Public Library.

Please let me know if you need any additional information.

Sincerely,

OCLC, INC.

By: Bruce A. Crocco
Bruce A. Crocco, Vice President

Approved by Legal PB

SOLE SOURCE AWARD

BID # SS-0371-14

SUBJECT: ACCESS TO OCLC DATABASE FOR CATALOGING, INTER-LIBRARY LENDING & SERVICES

DEPARTMENT: LIBRARY

DESCRIPTION OF PURCHASE: RECOMMEND APPROVAL TO RATIFY THE PERIOD OF SERVICE FROM OCTOBER 1, 2013 TO DATE OF AWARD.

RECOMMEND APPROVAL OF SOLE SOURCE AWARD WITH OCLC ONLINE COMPUTER LIBRARY CENTER, INC. FOR ACCESS TO THE OCLC DATABASE FOR CATALOGING, INTER-LIBRARY LENDING AND REFERENCE SERVICES. PERIOD OF SERVICE IS FROM DATE OF AWARD THROUGH SEPTEMBER 30, 2014 IN THE NOT TO EXCEED AMOUNT OF $105,508.00.

FUNDING SOURCE: PLJX011MBBS-04662
SOLE SOURCE AWARD TO: OCLC ONLINE COMPUTER LIBRARY CENTER, INC.

PRICE JUSTIFICATION: SEE ATTACHED

TOTAL AWARD: $105,508.00 Requisition #: 142663

ATTACHMENTS: RECOMMENDATION MEMO, SOLE SOURCE FORM, VENDOR LETTER & QUOTE, PREVIOUS AWARDS

CERTIFICATION AS TO SOLE SOURCE: BARBARA GUBBIN, DIRECTOR, JACKSONVILLE PUBLIC LIBRARY

THE ABOVE PURCHASE IS RECOMMENDED FOR AWARD IN ACCORDANCE WITH CHAPTER 126.206.

Analyst: Annette Burney

MR

Gregory Pease, Chief
Procurement Division

APPROVAL OF GENERAL GOVERNMENT AWARDS COMMITTEE

"ALL AWARD ACTIONS SUBJECT TO LAWFULLY APPROPRIATED FUNDS"

CHAIRMAN

10/31/13
DATE

ACTION OF AWARDING AUTHORITY DATE: 11/1/13

APPROVED ✓ DISAPPROVED _____

OTHER _____

SIGNATURE OF AUTHENTICATION Karen Bowling
Karen Bowling
Chief Administrative Officer
For: Mayor Alvin Brown
Under Authority of:
Executive Order No. 2013-04

FORM GB-113, Revised 12/2007

SS-0371-14

SOLE SOURCE/PROPRIETARY REQUEST

Pursuant to the City of Jacksonville Procurement Code § 126.206 & § 126.312, when requesting a purchase from a vendor subject to the referenced sections, please complete this form to justify your request and submit to Procurement with applicable attachments.

REQUESTING AGENCY (DEPT./DIVISION): Jacksonville Public Library

PROPRIETARY ☐

SOLE SOURCE ☒

FUNDING SOURCE: PLJX011MBBS 04662

BRIEF DESCRIPTION OF GOODS/SERVICES:
Access to the OCLC database which is used for cataloging, inter-library lending and reference services.

AMOUNT OF PROJECT (attach quote): $105,508

PROVIDE A SUMMARY OF THE SCOPE OF GOODS/SERVICES TO BE PROVIDED; IDENTIFY EACH ITEM, COMPONENT OR SERVICE BEING PROCURED (ATTACH QUOTE/PROPOSAL):
OCLC shares information about the library and copy holdings of most libraries in the country. Participation requires the input of Jacksonville Public Library's title and copy information into this shared database. A quote is attached with detailed pricing information.

PROVIDE A DETAILED JUSTIFICATION AS TO WHY THE REQUESTED GOODS/SERVICES CAN ONLY BE EFFICIENTLY AND EFFECTIVELY PROCURED THROUGH THE RECOMMENDED PROPRIETARY/SOLE SOURCE PROVIDER:
OCLC is the sole provider of access to the OCLC database in the Southeast region of the United States. The OCLC database contains more than 35 million bibliographic records with holdings information for libraries of all types throughout the world. It is totally unique and there is no other organization like it in existence.

ASSERT THAT YOU HAVE RESEARCHED THE AVAILABILITY OF THE REQUESTED GOODS/SERVICES FROM OTHER SOURCES IN APPLICABLE MARKETS AND HAVE DISCUSSED AND EVALUATED THE SAME WITH COJ'S PROCUREMENT AND EBO DIVISIONS:
Library staff have investigated the existence of other vendors that provide access to the OCLC database to libraries in the United States. To our knowledge no other source exists.

Submitted by: Lynnea Jacobson (Name) — B.b. Systems & Access Manager (Title)

Date: 10/16/2013

Requesting Agency's Director's Signature: [signature] 10-18-13

Procurement Division **September, 2008**

SOLE SOURCE AWARD

BID # SS-0399-13

Subject: Access to OCLC Database for Cataloging, Inter-Library and Reference Services FY 13

Department: LIBRARY

Description of Purchase:

RECOMMEND APPROVAL OF SOLE SOURCE AWARD TO OCLC FOR THE PERIOD FROM DATE OF AWARD THROUGH SEPTEMBER 30, 2013, IN THE AMOUNT OF $123,933.77 FOR ACCESS TO THE OCLC DATABASE

Sole Source Award To: OCLC

Price Justification: SEE ATTACHMENT

Total Award: $123,933.77 **Requisition #** 126959

Attachments: RECOMMENDATION MEMO, SOLE SOURCE REQUEST, VENDOR LETTER , REQ., AND PREVIOUS AWARD

Certification as to Sole Source: LYNN JACOBSON, LIBRARY SUPERVISOR, INTEGRATED LIBRARY SYSTEM

THE ABOVE PURCHASE IS RECOMMENDED FOR AWARD IN ACCORDANCE WITH CHAPTER 126.206.

Buyer:

Gregory Pease, Chief
Procurement Division

APPROVAL OF GENERAL GOVERNMENT AWARDS COMMITTEE

"ALL AWARD ACTIONS SUBJECT TO LAWFULLY APPROPRIATED FUNDS"

CHAIRMAN

DATE 11/29/12

ACTION OF AWARDING AUTHORITY DATE: 12/3/12

APPROVED

DISAPPROVED

OTHER

SIGNATURE OF AUTHENTICATION

Cleveland Ferguson, III
Deputy Chief Administrative Offic
For: Mayor Alvin Brown
Under Authority of:
Executive Order No. 2012-17

FORM GB-113, Revised 12/2007

Requisition

Jacksonville
Where Florida Begins

City of Jacksonville
214 N. Hogan Street, Suite 800
Jacksonville, FL 32202

Informal Quote Ending Date	Requisition No.
	REQ142663

SHIP TO
Public Library
Public Library - University Park
3435 University Blvd. North - rear loading dock
Jacksonville, FL 32277

BILL TO
Finance Services Department
Accounts Payable
117 W. Duval Street, Suite 376
Henry Noles, Accounts Payable Supervisor
Jacksonville, FL 32202

Requesting Department	Buyer	Phone #	Requisition Type
Public Library	Ivy Posey	(904) 255 - 8816	Open Market

Item	Description	Quantity	Unit	Unit Price	Total
1.00	Access to Cataloging on-line service, inter-library lending (ILL) service, WebDewey Cataloging, Baker & Taylor, ILLiad-OCLC hosted server/Illiad annual license and access fees. -estimated amount-base on payment of actual charges. Eff. From award thru 09/30/2014	1.00	EA	$105,508.00	$105,508.00
	Subtotal:				$105,508.00
	Discount:				$0.00
	TOTAL:				$105,508.00

FY/Account Code	Dollar Amount
14/ PLJX011MBBS-04662	$105,508.00

I CERTIFY THAT FUNDS FOR THIS PURCHASE WERE AUTHORIZED AND PROVIDED FOR IN THE CURRENT BUDGET.

AUTHORIZED SIGNATURE

TITLE

DATE

PHONE