

TABLE OF CONTENTS

DESCRIPTION AND BACKGROUND	2
PROVIDERS	3
DURATION OF THE CONTRACT	3
AWARD OF CONTRACT	3
REGIONAL REFERENCE AND RESEARCH CENTER REQUIREMENTS	3
SEMLS RESPONSIBILITIES	7
RESPONSIBILITIES OF SUCCESSFUL BIDDERS	8
INSTRUCTION FOR SUBMISSION OF RESPONSES	8
EVALUATION, INQUIRIES AND AWARD OF CONTRACT	10
APPENDIX A	
CMR 7.01: Regional Reference and Research Centers; Standards	A1
Minimum Standards for Regional Reference and Research Centers	A3
APPENDIX B	
Supplemental Reference Activity Statistics	B1
Value of Service – Regional Reference Program Contracts	B2
Supplemental Reference Service Reference Questions from Libraries	B3
Supplemental Reference Service Reference Questions from Residents	B7
Appeals Policy	B11
APPENDIX C	
Library Description	C1
Regional Reference Standards Checklist	C2
Reference Resources	C3
APPENDIX D	
Reference Contract Pricing	D1
Bidder Information	D6

SOUTHEASTERN MASSACHUSETTS REGIONAL LIBRARY SYSTEM REFERENCE REQUEST FOR PROPOSALS

1. DESCRIPTION AND BACKGROUND

1.1 Description

The Southeastern Massachusetts Library System (SEMLS) is seeking responses for the provision of supplemental reference service to our member libraries and direct resident access to research collections. This proposal is for three years beginning July 1, 2010 and ending June 30, 2013.

Supplemental reference service to libraries allows members to refer informational requests that cannot be answered using resources available within the library to a regional research and reference center.

Direct resident access to regional reference and research centers provides users with direct onsite, electronic and telephone access to supplemental reference and research services beyond those available in individual libraries.

The Massachusetts Board of Library Commissioners renewed Minimum Standards for Regional Reference and Research Centers FY2006—FY2008 and extended through FY2011; approved by the MA Board of Library Commissioners on December 11, 2008.

1.2 Authority

The Southeastern Massachusetts Library System (SEMLS) is a multi-type library cooperative funded through the Massachusetts Board of Library Commissioners. Chapter 78: Section 19C of the General Laws of Massachusetts authorizes the Board of Library Commissioners to "establish a comprehensive statewide program of regional library service, consisting of regional library systems, which shall not exceed six, for the purpose of providing reference and research services, interlibrary loan, delivery, and other regional services to public, school, academic, and special libraries in the region...."

Chapter 78 Section 19C (2) states "Said board shall also designate libraries in each area to serve as a regional reference center or centers to meet the reference and research library needs for the residents of all the cities and towns in each such area: provided, however, that the amount allocated for such reference and research service shall be applied only to the costs of reference and research books, periodicals and other library materials and the personnel employed in such reference and research service in accordance with a regional plan of service. Minimum standards for reference and research centers shall be developed by the Board of Library Commissioners in consultation with the regional library systems."

1.3 Background

The Southeastern Massachusetts Regional Library System (SEMLS) is one of six multi-type regions in the state.

Today, the Southeastern Massachusetts Library System has 386 members – 12 Academic, 101 Public, 236 School and 37 Special Libraries. A list of members can be found on the SEMLS Web site (www.semls.org.) Regional Reference and Research Centers will serve all current and future SEMLS members.

**SOUTHEASTERN MASSACHUSETTS REGIONAL LIBRARY SYSTEM
REFERENCE REQUEST FOR PROPOSALS**

SEMLS contracts with the Falmouth Public Library and the Thomas Crane Public Library, Quincy to provide reference services today. Both centers provide reference to libraries and residents, workshops and trainings, reference center orientation, newsletter articles and consulting services for members. The current contract with these providers ends June 30, 2010. Statistics for reference to libraries and reference to residents are in Appendix B.

Based on data provided by the current Regional Reference Centers, SEMLS estimated the staff time needed to answer questions received from libraries; and questions received from residents and other services contractually required by SEMLS, e.g. workshops and participation in Mass Answers. These statistics can be found in Appendix B.

SEMLS, in conjunction with the other regional library systems, provides the Massachusetts Board of Library with a Value of Service for all the programs that a region provides. Detail of values for the contracted Supplemental Reference Program can be found in Appendix B.

2. PROVIDERS

The Southeastern Massachusetts Library System will contract with up to two (2) reference and research centers; providers must meet the MBLC Minimum Standards for Regional Reference and Research Centers.

3. DURATION OF THE CONTRACT

The duration of this contract will extend from July 1, 2010 through June 30, 2013. All Reference and Research Center contracts are contingent upon state funding appropriated by the Commonwealth of Massachusetts and negotiation with SEMLS.

4. AWARD OF CONTRACT

The contract(s) will be awarded on or before June 30, 2009. All Regional Reference and Research Center Libraries must meet Minimum Standards for Regional Reference and Research Centers.

If during the contract award, the Regional Reference and Research Center fails to meet Minimum Standards for Regional Reference and Research Centers, SEMLS will impose a financial penalty or may seek to void the contract if it is deemed in the best interest of the regional members. If SEMLS plans to void a contact, the Regional Reference Center would be notified and would be given time to remedy the breach of the standards.

The Southeastern Massachusetts Library System may cancel this request in whole or in part at any time whenever such an act is deemed in its best interest.

**SOUTHEASTERN MASSACHUSETTS REGIONAL LIBRARY SYSTEM
REFERENCE REQUEST FOR PROPOSALS**

5. REGIONAL REFERENCE AND RESEARCH CENTER SERVICE AND RESOURCE REQUIREMENTS

5.1 Scope of Services

Vision: The regional reference center library should exemplify the SEMLS vision by providing quality library service in general and quality reference service in particular. The following specific qualities should be readily apparent:

1. Barrier-free access to collections and services.
2. Professional customer-oriented staff.
3. A collection with depth of both physical and electronic resources.
4. State-of-the-art technology.
5. A high level of use.
6. Significant programming.
7. Services available seven (7) days per week.

In addition, SEMLS places great importance on the reference center's proven expertise in providing reference service. A regional reference center encourages use of its reference services by taking a leadership role in the region and by publicizing these services.

5.2 Service Requirements of a Regional Reference and Research Center

A. Direct Service to Member Libraries and Residents

The Reference Center shall provide direct reference service to member libraries and residents of SEMLS. Projected outcomes for these services in the FY 2009 Program Budget are:

1. Supplemental reference to libraries: 500 questions.
2. Direct resident access to Regional Reference Center: 10,000 questions.

A Regional Reference and Research Center will:

- a. Provide telephone, fax, electronic (including e-mail, instant messaging, chat and other technologies such as texting and Twitter) and the other mutually agreed upon reference service to member libraries all hours that library is open using all available resources including local collections, databases, community institutions and other local agencies.
- b. Provide walk-in, telephone, fax, electronic (including e-mail, instant messaging, chat and other technologies such as texting and Twitter) and other mutually agreed upon reference service to residents of the region all hours that the library is open, using all available resources including local collections, databases, community institutions and other local agencies.

**SOUTHEASTERN MASSACHUSETTS REGIONAL LIBRARY SYSTEM
REFERENCE REQUEST FOR PROPOSALS**

- c. Provide member libraries with procedures and protocols for processing electronic questions.
- d. Provide at a minimum an “800” telephone number, instant messaging and e-mail address for member libraries to contact the reference department.
- e. Respond to requests for information received from member libraries in the mode that the member libraries requests, e.g. by telephone, e-mail, electronically.
- f. Select and acquire reference materials, in a variety of formats, which will support the information needs of member libraries and residents of the SEMLS area.
- g. Have a collection development policy that addresses the information needs of residents of all ages and ethnic groups.
- h. Reference and research centers must have a dynamic, user-friendly, interactive and current Web site for members and residents.
- i. Provide member libraries and resident response times as follows:
 - 1. Accurate answers to ready-reference questions to walk-in customers, by electronic means and by telephone, within a 3-5 minute time frame.
 - 2. Accurate answers to questions received by fax and other electronic means (such as e-mail) within a two-hour time frame.
 - 3. If a question cannot be answered in the above time frame, the person or member library will be contacted to provide an estimated time for researching and responding to the question or provide a referral as appropriate.
- j. Provide electronic catalog checks and shelf checks for special titles in the collection for patron pick up.

5.3 Resource Requirements of a Regional Reference and Research Center

The Southeastern Massachusetts Library System requires that any institution desiring to have a reference and research center contract meet Standards for Regional Reference and Research Centers (Appendix A.) These standards should be met within the library’s operating budget.

A. Measures of Strength of Resources

- 1. Total Materials Expenditures (Main Library)
Standard: The main library must meet the minimum standard of materials expenditure for State Aid to Public Libraries.
- 2. Reference Expenditures (Main Library)

**SOUTHEASTERN MASSACHUSETTS REGIONAL LIBRARY SYSTEM
REFERENCE REQUEST FOR PROPOSALS**

Standard: Twenty percent of the minimum standard of materials expenditure for State Aid to Public Libraries must be spent on reference materials for the main library.

B. Measures of Accessibility to Resources

1. Number of Saturdays Open (Main Library)

Standard: 48 Saturdays. The main library must be open a minimum of seven hours on a Saturday.

2. Number of Sundays Open (Main Library)

Standard: 40 (September - June) Sundays, Sunday holidays exempted. The main library must be open a minimum of four hours on a Sunday.

3. Number of hours worked by MLS Reference Staff (Main Library)

Standard: Minimum of 189 reference staff hours per week.

4. Number of Public Access Points Provided to the Internet (Main Library)

Standard: 30 access points (includes the maximum WiFi concurrent users) that must include at least 20 computer workstations or laptop computers provided by the library.

5. Building is Accessible to People with Disabilities (Main Library)

Standard: The library has developed a plan for service to people with disabilities that meets criteria established by the Board of Library Commissioners. The plan as implemented includes services provided through adaptive technology, including TTY, use of fax and e-mail for questions and responses, voice-activated software, and other technologies.

C. Measures of Use of Resources

1. Non-Resident Onsite Circulation Transactions (Main Library)

Standard: 50,000 direct non-resident circulation transactions.

2. Total Number of Reference Transactions (Main Library)

Standard: 40,000 direct resident and non-resident reference transactions.

3. Number of In-Library Uses of Electronic Services (Main Library)

Standard: 20,000 uses per year.

**SOUTHEASTERN MASSACHUSETTS REGIONAL LIBRARY SYSTEM
REFERENCE REQUEST FOR PROPOSALS**

5.4 Other Requirements of a Reference and Research Center:

A. Staffing

Staff must have a commitment to accuracy and library/patron satisfaction. Staff should be approachable and have good communication skills. Staff must also have a broad knowledge of available resources.

B. Collections

Reference and Research Center must have collections to serve the reference needs of all ages and ethnic groups.

C. Other

A Reference and Research Center must have parking and/or be easily reached by alternative transportation. They must qualify for State-Aid Program in FY 09 and expect to qualify for State-Aid Program throughout this contract. Have a written Reference Policy.

5.5 Reporting Requirements of a Reference and Research Center

Reference and Research Centers of the Southeastern Massachusetts Library System must agree to provide the regional office the following reports and statistics:

1. Provide SEMLS office with actual counts of reference questions from libraries.
2. Provide SEMLS with quarterly statistics of non-resident reference activity. The center will conduct four weekly surveys during the months of July, October, January and April.
3. Provide SEMLS with an annual report reviewing the past year's activities and including statistics: This report should be a summary of statistics plus samples of the types of questions asked by libraries and residents.
4. Designate a senior staff member to coordinate regional reference services with SEMLS and its members.
5. Communicate regularly with SEMLS and its member libraries via e-mail and reports.
6. Provide the regional office with a copy of the monthly financial reports submitted to the Massachusetts Board of Library Commissioners.
7. Provide the regional office with an official audit of its allocated funds. The reference and research center shall maintain records of receipts, operating and salary expenditures in accordance with fiscal procedures acceptable to their auditing agency.

**SOUTHEASTERN MASSACHUSETTS REGIONAL LIBRARY SYSTEM
REFERENCE REQUEST FOR PROPOSALS**

6. SEMLS RESPONSIBILITIES

The Reference and Research Centers can expect the regional office staff to assist them in the following ways:

1. Hold a minimum of two meetings a year with reference center staffs to discuss regional reference.
2. Survey membership to determine the effectiveness and efficiency of the reference program.
3. Provide space on the region's home page and in the region's newsletter for any news releases from the centers.
4. Work with reference and research centers to develop public relations materials.

7. RESPONSIBILITIES OF SUCCESSFUL BIDDERS

1. Upon award of a contract, the bidder shall indemnify and hold SEMLS harmless from and against all claims, losses, expenses and costs damages, and liabilities (including reasonable attorneys' fees and amounts paid in settlement of any claim,) brought, claimed or rendered against SEMLS arising out of or in connection with Bidder's performance of its services under this Agreement, or resulting in any way from any negligent act or omission on the part of the Bidder or resulting from the Bidder's breach of any representation, warranty, or failure to perform or observe any of the obligations hereunder.
2. Bidder warrants that it has used due diligence in the selection and supervision of its employees including, but not limited to, insuring that its employees have integrity, professionalism, responsibility, and competence as reference librarians. Bidder covenants that it will continue to exercise such due diligence in the selection and supervision of its employees during the term of this Contract.

8. INSTRUCTION FOR SUBMISSION OF RESPONSES

8.1 Delivery of Responses

One original and six (6) complete copies of the Response must be submitted. The outermost sealed envelope must be marked "Supplemental Reference Response."

All responses must be delivered to the Southeastern Massachusetts Library System at:

Southeastern Massachusetts Library System
Attn.: Cynthia Roach, Regional Administrator
10 Riverside Drive
Lakeville MA 02347

Responses may be mailed, or hand delivered, but must be received at the Southeastern Massachusetts Library System office by **4:00 p.m. on April 17, 2009. No responses will be accepted after 4:00 p.m. on April 17, 2009.**

**SOUTHEASTERN MASSACHUSETTS REGIONAL LIBRARY SYSTEM
REFERENCE REQUEST FOR PROPOSALS**

1. SEMLS will not be responsible for any costs incurred by a bidder in the preparing and submitting of a proposal in response to this request.
2. Any information which may have been released either orally or in writing prior to the issuance of this request shall be deemed preliminary and bind neither SEMLS nor the bidders.
3. Proposals may be changed or withdrawn prior to the due date by submission of such change in writing in a sealed envelope, identifying the submitting party and indicating that it contains a correction of the pricing or non-pricing proposal for supplemental reference service.
4. The Southeastern Massachusetts Library System may cancel this request in whole or in part at any time whenever such an act is deemed in its best interest.
5. The Southeastern Massachusetts Library System and its RFP Committee may make visits to inspect collections; reference services performed by and work products of the library to any responder of this request for proposal prior to awarding a contract.
6. The Reference and Research Centers are retained solely for the purposes of and to the extent set forth in this proposal. Reference and Research Center's relationships to the Southeastern Massachusetts Library System (SEMLS) during the term of this contract shall be that of an independent contractor. Contract terms are negotiated by SEMLS and the selected bidders to this proposal. Regional Reference Center designation is subject to the approval of the Massachusetts Board of Library Commissioners.
7. Responders are responsible for having all insurance that may apply to this type of service.

8.2 Format of Responses

The response should include the following sections:

A. Checklists and Responses to Questions

Appendix C has checklists and questions that the responder must answer. Please be sure to include all the worksheets.

B. Narrative

The narrative portion of the response gives you the opportunity to tell us about yourself and should include answers to the following questions:

1. What are your expectations of municipal support of the library's budget over the next three years? What would be the impact of budget cuts on this contract if it were awarded to you?
2. Do you foresee any periods of service interruptions over the next three years? If you do, how would you handle the requirements of this contract if it were given to you?

**SOUTHEASTERN MASSACHUSETTS REGIONAL LIBRARY SYSTEM
REFERENCE REQUEST FOR PROPOSALS**

3. How do you plan to coordinate and promote this service to SEMLS members, including any support or assistance you will need from the SEMLS office?

C. Budget

Providers should provide budget information for the contract period. Appendix D has a budget form that must be used in responding to this proposal. Appendix B includes statistics from the last four (4) years and should be used in preparing the budget. SEMLS estimates the following outcomes for FY 2010: 500 reference questions from libraries and 10,000 reference questions from residents.

All SEMLS budgeting is contingent upon receipt of state funding appropriated by the Commonwealth of Massachusetts. In the event of funding reductions, SEMLS reserves the right to renegotiate this agreement with the Successful Bidder(s).

SEMLS shall have the option of renewing this Agreement, for two terms of one year each, subject to any revised compensation amounts mutually agreed to in writing. By August 1 of each year of the agreement, the Provider shall SEMLS will a signed copy of Minimum Standards for Regional Reference and Research Centers Checklist. If at any time during the contract if a Reference and Research Center fails to standards, SEMLS will impose a financial penalty SEMLS has identified 5 of the standards as essential to the provision of supplemental reference service and these are the standards that will cause of financial penalty to exist.

9. EVALUATION, INQUIRIES AND AWARD OF CONTRACT

9.1 Response Evaluation

The SEMLS RFP Committee and Regional Staff will evaluate all proposals. The committee will make recommendations to the Executive Board.

Successful bidders will score each proposal. Proposals may receive up to 90 points. SEMLS will also consider collections and references as other components in the award for a possible total of 100 points.

Bidders may be invited to participate in an interview with a committee consisting of the members of the RFP committee.

A response which fails to meet any material term or condition of this proposal, including the submission of required attachments, may lose points or be deemed unresponsive or disqualified.

SEMLS reserves the right to reject any proposal which, in its judgment, fails to meet the requirements of this proposal or which is incomplete, conditional, or obscure; which has erasures, alterations, or other irregularities; or in which errors occur.

SEMLS reserves the right to waive discrepancies or permit a bidder to clarify such discrepancies and to conduct discussions with all qualified bidders in any manner necessary to serve the best interests of SEMLS. SEMLS reserves the right to award a contract based on written proposals received without prior discussions or negotiations.

**SOUTHEASTERN MASSACHUSETTS REGIONAL LIBRARY SYSTEM
REFERENCE REQUEST FOR PROPOSALS**

All responses and information submitted in response to this proposal will be made available to any member who requests that information.

9.2 Written Inquiries

Questions regarding these specifications will be accepted in writing (via fax, e-mail or post) up to 4:00 p.m. on **March 31, 2009**. Written answers will be distributed to all interested parties. SEMLS staff will not answer questions verbally. E-mail to ***croach@semls.org***.

9.3 Award

The Southeastern Massachusetts Library Systems will award contracts based on the best interests of membership. All bidders will be informed of the decision of SEMLS by June 30, 2009. SEMLS will make awards on a year-to-year basis for three years. All Reference and Research Center contracts are contingent upon state funding appropriated by the Commonwealth of Massachusetts and negotiation with SEMLS.

APPENDIX A

**CMR 7.01: REGIONAL REFERENCE AND RESEARCH CENTERS; STANDARDS
MINIMUM STANDARDS FOR REGIONAL REFERENCE & RESEARCH CENTERS**

**SOUTHEASTERN MASSACHUSETTS REGIONAL LIBRARY SYSTEM
REFERENCE REQUEST FOR PROPOSALS**

CMR 7.01: REGIONAL REFERENCE AND RESEARCH CENTERS; STANDARDS

7.01 Regional Reference and Research Centers: Standards

1. For each regional library system, the Board of Library Commissioners (Board) shall designate a minimum of one regional reference and research center. If the area served by the regional library system exceeds 1,500 square miles, the Board shall designate a second regional reference and research center. The Board based on the recommendation of the regional library system may designate additional centers. If a second center is required and there are not sufficient libraries which meet the minimum criteria specified in 605 CMR 7.01(3), the requirement for a second center shall be waived.
2. A minimum of 12 ½¢ per capita shall be expended by the regional library system for regional reference and research center services if there is a single designated center, and a minimum of 18¢ per capita if two or more are designated. Additional funding may be provided based on the types and range of services provided by the center(s).

These minimum per capita amounts may be adjusted by vote of the Board based on an increase or decrease in the regional library system annual appropriation using the FY2002 appropriation as a base.

The Board may waive this requirement upon the recommendation of a regional library system if:

- (a) The regional library system has conducted an open competitive procurement that has resulted in a library or libraries offering to provide reference services described in 605 CMR 7.01(3) and (4) for an amount less than the amount determined by the formula in 605 CMR 7.01(2); or,
 - (b) The regional library system and an existing reference center library mutually agree in writing that the reference services described in 6.05 CMR 7.01(3) and (4) can be provided for an amount less than the amount determined by the formula in 605 CMR 7.01(2).
3. The Board establishes minimum eligibility standards for regional reference and research centers relating to strength of resources, accessibility to resources, use of resources, and level of performance. These standards constitute minimum criteria for a library to be designated a regional reference and research center under MGL c. 78, § 19C(2). At its discretion, the Board may grant a phase-in period for implementation of any or all standards adopted under MGL c. 78, § 19C(2). In the event no library within the area served by a regional library system meets the minimum eligibility standards established by the Board, the Board may waive any or all of the standards in order to designate a regional reference and research center as set forth in 605 CMR 7.02(1). Services shall be available in person, via toll-free telephone for member libraries, fax and electronic means. Each regional reference and research center shall publicize the services it offers.
 4. A regional library system and a regional reference and research center may agree on the provision of certain further reference and research services, such as:
 - (a) Specialized reference collections (includes foreign language);

**SOUTHEASTERN MASSACHUSETTS REGIONAL LIBRARY SYSTEM
REFERENCE REQUEST FOR PROPOSALS**

- (b) Extended hours reference service;
 - (c) Enhanced electronic and Web-based reference services;
 - (d) Specialized services for users with disabilities;
 - (e) Training for libraries and the public in the use of supplemental reference services;
 - (f) 24x7, chat or similar Web-based, on-demand service.
5. For purposes of this program, within the Boston Regional Library System, regional reference and research center services shall be defined as those provided through the Library of Last Recourse for service to residents and through the Statewide Reference and Referral Center for libraries.

REGULATORY AUTHORITY
605 CMR 7.00: M.G.L. c. 78 § 19

**SOUTHEASTERN MASSACHUSETTS REGIONAL LIBRARY SYSTEM
REFERENCE REQUEST FOR PROPOSALS**

**MINIMUM STANDARDS FOR REGIONAL REFERENCE AND RESEARCH CENTERS
FY2006—FY2008 EXTENDED THROUGH FY 2011
APPROVED, OCTOBER 7, 2004; APPROVED DECEMBER 11, 2008**

History and Legislation

The General Laws of Massachusetts, Chapter 78: Section 19C gives the Massachusetts Board of Library Commissioners responsibility for the establishment of a comprehensive statewide program of regional library service consisting of up to six regional library systems. The regional library systems provide reference and research services, interlibrary loan, delivery, and other regional services to public, school, academic and special libraries within each region.

Section 19C(2) also mandates that the Board of Library Commissioners designate Regional Reference and Research Centers. At present, the Board has designated seven public libraries to serve in this capacity. Each Regional Reference Center provides services under a contractual relationship with the Board and their respective regions, reflecting the principle that accountability in use of state funds for the program is best assured through a state and regional partnership most responsive to the specific needs of regional member libraries and residents.

Chapter 78: Section 19C(2) also mandates that the Board of Library Commissioners develop “minimum standards for reference and research centers ... in consultation with the regional library systems.”

Standards Development and Scope

The Minimum Standards for Regional Reference and Research Centers FY2006—FY2008, also referred to as “second generation standards,” were drafted in consultation with a committee that included representation from the Massachusetts Regional Library System administrators, Regional Reference and Research Center directors and heads of reference, and regional reference and electronic database committee chairpersons, and were reviewed and revised by the Board Committee on Regional Library Systems and the Library of Last Recourse. In addition, proposed standards were subjected to a full year of data collection in FY2003 to determine the efficacy of each standard. Some proposed standards were rejected based on the results of this data collection effort.

In developing these standards the committee recognized the responsibility contained in Chapter 78:19C(2) that each Regional Reference and Research Center must provide reference and research services directly to residents (in person, via telephone and via e-mail), and indirectly to residents through supplemental reference service to Regional Library System member libraries (resident information requests that cannot be answered locally and are referred to the Center.)

In addition to designated Reference and Research Centers, Regional Library Systems may also contract with other libraries to provide additional specialized reference services as needed by the region.

**SOUTHEASTERN MASSACHUSETTS REGIONAL LIBRARY SYSTEM
REFERENCE REQUEST FOR PROPOSALS**

Standards and Regional Library Systems

Each Regional Library System must incorporate the minimum standards into its requirements for Regional Reference and Research Center services. In addition to these minimum standards, a Regional Library System and Regional Reference and Research Center may agree to additional service contract provisions.

Under the provisions of each Regional Library System's agreement with the Board of Library Commissioners, contracts for Regional Reference and Research Center services must be for a minimum period of three years, and may be renewed indefinitely as long as the library providing the service continues to provide services specified in the agreement between the library and region and continues to meet the standards. At a minimum, an evaluation and/or review of regional reference service must be conducted every three years.

Any recommendation from a Regional Library System for a change in designation of a Regional Reference and Research Center must demonstrate that the quality of reference and research services will be increased *as defined by the standards currently in effect*. In the event that such a recommendation is made, this recommendation will be taken under consideration by the Board of Library Commissioners for study prior to any formal action by the Board. This consideration and study may include negotiation between the Board, the affected center or centers, and the Regional Library System. An appeals process is provided under CMR Title 801, Ch. 1.00 (Standard adjudicatory rules of practice and procedure.)

**Standards for Regional Reference Contracting Libraries
FY2006—FY2008; extended through FY 2011**

Vision

A regional reference center library should exemplify quality library service in general and quality reference service in particular. The following specific qualities should be readily apparent:

- Barrier-free access to collections and services,
- Professional customer-oriented staff,
- A collection with depth of both physical and electronic materials,
- State of the art equipment,
- A high level of use,
- Significant programming.

A regional reference center encourages use of its reference services by taking a leadership role in the region and by publicizing these services.

Goal and Design

It is the goal of these standards to insure broad and timely access to collections, staff and facilities of such quality and scope that would provide and facilitate the delivery of reliable and consistent reference and research services to all residents in the cities and towns of the respective region.

The standards are designed to measure the strength of the resources of the reference center, their accessibility to the public and to account for the service level of usage and satisfactory performance. All measures are based on activity levels at the main library.

SOUTHEASTERN MASSACHUSETTS REGIONAL LIBRARY SYSTEM
REFERENCE REQUEST FOR PROPOSALS

1. Measures of Strength of Resources

A. Total Materials Expenditures (Main Library)

Standard: The main library must meet the minimum standard of materials expenditure for State Aid to Public Libraries.

B. Reference Expenditures (Main Library)

Standard: Twenty percent of the minimum standard of materials expenditure for State Aid to Public Libraries must be spent on reference materials for the main library.

2. Measures of Accessibility to Resources

A. Number of Saturdays Open (Main Library)

Standard: 48 Saturdays. The main library must be open a minimum of seven hours on a Saturday.

B. Number of Sundays Open (Main Library)

Standard: 40 (September-June) Sundays, Sunday holidays exempted. The main library must be open a minimum of four hours on a Sunday.

C. Number of hours worked by MLS Reference Staff (Main Library)

Standard: Minimum of 189 reference staff hours per week.

D. Number of Public Access Points Provided to the Internet (Main Library)

Standard: 30 access points (includes the maximum WiFi concurrent users) that must include at least 20 computer workstations or laptop computers provided by the library.

E. Building is Accessible to People with Disabilities (Main Library)

Standard: The library has developed a plan for service to people with disabilities that meets criteria established by the Board of Library Commissioners. The plan as implemented includes services provided through adaptive technology, including TTY, use of fax and e-mail for questions and responses, voice-activated software, and other technologies.

3. Measures of Use of Resources

A. Non-Resident On-site Circulation Transactions (Main Library)

Standard: 50,000 direct non-resident circulation transactions.

B. Total Number of Reference Transactions (Main Library)

Standard: 40,000 direct resident and non-resident reference transactions.

C. Number of In-Library Uses of Electronic Services (Main Library)

Standard: 20,000 uses per year.

APPENDIX B

**SUPPLEMENTAL REFERENCE ACTIVITY STATISTICS
VALUE OF SERVICE FOR CONTRACTUAL REGIONAL REFERENCE PROGRAM
ESTIMATED STAFF TIME NEEDED FOR REGIONAL REFERENCE CENTER
PROGRAM FY 2001-2008
APPEALS POLICY**

**SOUTHEASTERN MASSACHUSETTS REGIONAL LIBRARY SYSTEM
REFERENCE REQUEST FOR PROPOSALS**

**SUPPLEMENTAL REFERENCE ACTIVITY
FY2006 - FY2009**

**FY 2009 Statistics (through Feb
2008)**

Supplemental Reference to Libraries (July – Dec)	242
---	-----

Reference to Non-Residents (through 3 quarters)	7,943
--	-------

FY 2008 Statistics

Supplemental Reference to Libraries	616
--	-----

Reference to Non-Residents	14,027
----------------------------	--------

FY 2007 Statistics

Supplemental Reference to Libraries	629
--	-----

Reference to Non-Residents	17,069
----------------------------	--------

FY 2006 Statistics

Supplemental Reference to Libraries	619
--	-----

Reference to Non-Residents	17,290
----------------------------	--------

**SOUTHEASTERN MASSACHUSETTS REGIONAL LIBRARY SYSTEM
REFERENCE REQUEST FOR PROPOSALS**

Value of Service – Regional Reference Program Contracts

Reference questions are valued at \$35.00/question; reference questions from residents are valued at \$7.00/question; workshops are valued at \$150 for one-half day and \$250 for whole day workshops; and consulting hours are valued at \$125/hour. The following chart shows the estimated value for these program areas. In addition, we have given 7 hours prep time for each workshop and have given each site visit 7.5 hours for prep time, travel and visit and \$50 for each newsletter article written

Fiscal year	# of questions from libraries	Value Questions from Libraries @ \$35	# of questions from residents (not residents of local community)	Value Reference to Non-Residents @ \$7	Number of Workshop s/ half-day training sessions	Value of workshops @ \$150 plus 7 hours prep @ \$125	# of consulting site visits	Consulting Visits @ \$125/Hour for 7.5	# of News letter Articles	Value of Articles @ \$50/article	Total Value for contracted Reference Program
2008	616	\$21,560	13,975	\$97,825	5	\$5,250	11	\$10,312.50	6	\$300	\$135,248
2007	629	\$22,015	16,796	\$117,572	8	\$8,400	8	\$7,500	6	\$300	\$155,787
2006	619	\$21,665	17,290	\$121,030	6	\$6,300	8	\$7,500	6	\$300	\$156,795
2005	594	\$20,790	18,538	129,766	5	\$5,250	6	\$5,625	6	\$300	\$161,483
2004	700	\$24,500	15,860	\$111,020	5	\$5,250	5	\$,4687.50	6	\$300	\$145,508

**SOUTHEASTERN MASSACHUSETTS REGIONAL LIBRARY SYSTEM
REFERENCE REQUEST FOR PROPOSALS**

**Supplemental Reference Service Reference Questions from Libraries
FY 2001-2008**

Definitions:								
	Ready Ref.	Questions answered in 5 or fewer minutes-used 5 minutes						
	Extended Ref.	Questions answered in 10 or fewer minutes-used 10 minutes						
	Research	Questions taking over 10 minutes - we used 30 minutes for the average						
	Average yearly Staff Hours @ 37.5 hours/week			1950				
Fiscal Year		Total Questions	# Ready Ref.	# Extended Ref.	# Research			
2008		616	100	281	235			
	Staff Time Minutes		500	2810	7050			
	Total Staff Hours		172.67					
	FTE				0.09			
2007		629	146	169	314			
2 Ref. Ctrs.	Staff Time Minutes		730	1690	9420			
	Total Staff Hours		197.33					
	FTE				0.10			

**SOUTHEASTERN MASSACHUSETTS REGIONAL LIBRARY SYSTEM
REFERENCE REQUEST FOR PROPOSALS**

**Supplemental Reference Service Reference Questions from Libraries
FY 2001-2008**

Definitions:								
	Ready Ref.	Questions answered in 5 or fewer minutes-used 5 minutes						
	Extended Ref.	Questions answered in 10 or fewer minutes-used 10 minutes						
	Research	Questions taking over 10 minutes - we used 30 minutes for the average						
	Average yearly Staff Hours @ 37.5 hours/week			1950				
Fiscal Year		Total Questions	# Ready Ref.	# Extended Ref.	# Research			
2006		619	204	192	223			
2 Ref. Ctrs.								
	Staff Time Minutes		1020	1920	6690			
	Total Staff Hours		160.5					
	FTE					0.08		
2005		594	121	282	191			
2 Ref. Ctrs.								
	Staff Time Minutes		605	2820	5730			
	Total Staff Hours		152.58					
	FTE					0.08		

**SOUTHEASTERN MASSACHUSETTS REGIONAL LIBRARY SYSTEM
REFERENCE REQUEST FOR PROPOSALS**

**Supplemental Reference Service Reference Questions from Libraries
FY 2001-2008**

Definitions:								
	Ready Ref.	Questions answered in 5 or fewer minutes-used 5 minutes						
	Extended Ref.	Questions answered in 10 or fewer minutes-used 10 minutes						
	Research	Questions taking over 10 minutes - we used 30 minutes for the average						
	Average yearly Staff Hours @ 37.5 hours/week			1950				
Fiscal Year		Total Questions	# Ready Ref.	# Extended Ref.	# Research			
2004		1138	358	455	325			
4 Ref. Ctrs.								
	Staff Time Minutes		1790	4550	9750			
	Total Staff Hours		268.17					
	FTE				0.14			
2003		983	362	344	277			
4 Ref. Ctrs.								
	Staff Time Minutes		1810	3440	8310			
	Total Staff Hours		226.00					
	FTE				0.12			

**SOUTHEASTERN MASSACHUSETTS REGIONAL LIBRARY SYSTEM
REFERENCE REQUEST FOR PROPOSALS**

**Supplemental Reference Service Reference Questions from Libraries
FY 2001-2008**

Definitions:								
	Ready Ref.	Questions answered in 5 or fewer minutes-used 5 minutes						
	Extended Ref.	Questions answered in 10 or fewer minutes-used 10 minutes						
	Research	Questions taking over 10 minutes - we used 30 minutes for the average						
	Average yearly Staff Hours @ 37.5 hours/week			1950				
Fiscal Year		Total Questions	# Ready Ref.	# Extended Ref.	# Research			
2002		1101	343	373	385			
4 Ref. Ctrs.								
	Staff Time Minutes		1715	3730	11550			
	Total Staff Hours		283.25					
	FTE				0.15			
2001								
4 Ref. Ctrs.		1459	309	407	743			
	Staff Time Minutes		1545	4070	22290			
	Total Staff Hours		465.08					
	FTE				0.24			

**SOUTHEASTERN MASSACHUSETTS REGIONAL LIBRARY SYSTEM
REFERENCE REQUEST FOR PROPOSALS**

**Supplemental Reference Service Reference Questions from Residents
FY 2001-2008**

Definitions:								
	Ready Ref.	Questions answered in 5 or fewer minutes-used 5 minutes						
	Extended Ref.	Questions answered in 12 or fewer minutes-used 10 minutes						
	Research	Questions taking over 12 minutes - we used 20 minutes for the average						
	Average yearly Staff Hours @ 37.5 hours/week			1950				
Fiscal Year		Total Questions	# Ready Ref.	# Extended Ref.	# Research			
2008		14027	7399	4875	1753			
	Staff Time Minutes		36995	48750	35060			
	Total Staff Hours		2013.42					
	FTE				1.03			
2007		17069	10114	4433	2522			
2 Ref. Ctrs.	Staff Time Minutes		50570	44330	50440			
	Total Staff Hours		2422.33					
	FTE				1.24			

**SOUTHEASTERN MASSACHUSETTS REGIONAL LIBRARY SYSTEM
REFERENCE REQUEST FOR PROPOSALS**

**Supplemental Reference Service Reference Questions from Residents
FY 2001-2008**

Definitions:								
	Ready Ref.	Questions answered in 5 or fewer minutes-used 5 minutes						
	Extended Ref.	Questions answered in 12 or fewer minutes-used 10 minutes						
	Research	Questions taking over 12 minutes - we used 20 minutes for the average						
	Average yearly Staff Hours @ 37.5 hours/week			1950				
Fiscal Year		Total Questions	# Ready Ref.	# Extended Ref.	# Research			
2006		17290	11882	4030	1378			
2 Ref. Ctrs.								
	Staff Time Minutes		59410	40300	27560			
	Total Staff Hours		2121.17					
	FTE				1.09			
2005		18538	15271	1913	1354			
2 Ref. Ctrs.								
	Staff Time Minutes		76355	19130	27080			
	Total Staff Hours		2042.75					
	FTE				1.05			

**SOUTHEASTERN MASSACHUSETTS REGIONAL LIBRARY SYSTEM
REFERENCE REQUEST FOR PROPOSALS**

**Supplemental Reference Service Reference Questions from Residents
FY 2001-2008**

Definitions:								
	Ready Ref.	Questions answered in 5 or fewer minutes-used 5 minutes						
	Extended Ref.	Questions answered in 12 or fewer minutes-used 10 minutes						
	Research	Questions taking over 12 minutes - we used 20 minutes for the average						
	Average yearly Staff Hours @ 37.5 hours/week			1950				
Fiscal Year		Total Questions	# Ready Ref.	# Extended Ref.	# Research			
2004		18161	13559	3562	1040			
4 Ref. Ctrs.								
	Staff Time Minutes		67795	35620	20800			
	Total Staff Hours		2070.25					
	FTE					1.06		
2003		23517	13238	8218	2061			
4 Ref. Ctrs.								
	Staff Time Minutes		66190	82180	41220			
	Total Staff Hours		3159.83					
	FTE					1.62		

**SOUTHEASTERN MASSACHUSETTS REGIONAL LIBRARY SYSTEM
REFERENCE REQUEST FOR PROPOSALS**

**Supplemental Reference Service Reference Questions from Residents
FY 2001-2008**

Definitions:								
	Ready Ref.	Questions answered in 5 or fewer minutes-used 5 minutes						
	Extended Ref.	Questions answered in 12 or fewer minutes-used 10 minutes						
	Research	Questions taking over 12 minutes - we used 20 minutes for the average						
	Average yearly Staff Hours @ 37.5 hours/week			1950				
Fiscal Year		Total Questions	# Ready Ref.	# Extended Ref.	# Research			
2002		17927	12159	3552	2216			
4 Ref. Ctrs.								
	Staff Time Minutes		60795	35520	44320			
	Total Staff Hours		2343.92					
	FTE					1.20		
2001		32586	19032	11916	1638			
4 Ref. Ctrs.								
	Staff Time Minutes		95160	119160	32760			
	Total Staff Hours		4118.00					
	FTE					2.11		

**SOUTHEASTERN MASSACHUSETTS REGIONAL LIBRARY SYSTEM
REFERENCE REQUEST FOR PROPOSALS**

APPEALS POLICY

The Southeastern Massachusetts Library System has established the following appeals process for an unsuccessful respondent of a SEMLS proposal to request reconsideration of the award of the SEMLS contract:

Within seven (7) working days of **written notification of the** award, the complainant must submit in writing a statement on the appeal; a statement of the action or relief sought; documentary evidence in support of the appeal; and what action or remedy the respondent would like to see happen. The appeal should be sent via certified mail to the President of SEMLS, c/o SEMLS, 10 Riverside Drive, Lakeville, MA 02347.

Within ten (10) working days of receiving **written notification of** such an appeal, the President of SEMLS will call an Executive Board meeting, hearing the appeal. The complainant, the SEMLS evaluation team and other interested parties will be invited to the hearing. Within ten (10) working days after the hearing, the Executive Board will render its decision in writing to the complainant, other interested parties and the Massachusetts Board of Library Commissioners.

The decision of the SEMLS Executive Board will be final.

**SOUTHEASTERN MASSACHUSETTS REGIONAL LIBRARY SYSTEM
REFERENCE REQUEST FOR PROPOSALS**