



May 26, 2011

## Sacramento Public Library Authority

### Agenda Item 11.0: Service Contract: Fixed Asset Inventory Services

**TO: Sacramento Public Library Authority Board**

**FROM: Don Tucker, Director of Facilities**

**RE: Service Contract: Fixed Asset Inventory Services**

#### **RECOMMENDED ACTIONS:**

**Adopt** Resolution #11-30, A Resolution Approving a Service Contract with Probar, a Division of Bondurant Enterprises, Inc., for Fixed Asset Inventory Services in an Amount Not to Exceed \$158,000

#### **REASON FOR RECOMMENDATION**

The Sacramento Public Library Authority received a finding in the fiscal year 2009-10 financial audit that a complete inventory of fixed assets should be performed. The Authority has a limited recorded inventory of fixed assets at this time, consisting of all Information Technology (IT) equipment and a small number of miscellaneous items. A complete inventory consisting of counting, tagging and assigning a value to each piece of furniture and equipment in library facilities, and then recording that inventory into the agency's enterprise software (Eden), has never been performed.

Library Authority staff developed a Request for Proposal (RFP) to perform this work. It was distributed on February 25, 2011 with a response date of March 18 at 3 pm. Four proposals were received by the deadline, and a review team was assembled to research the proposals and references and to make a recommendation. The team members were:

1. Alan Worthy, IT Supervisor
2. Pat Samsell, Finance Management Consultant
3. Don Tucker, Director of Facilities
4. Rick Smith, Sacramento County Capital Construction Budget Manager

The team met on March 25 and discussed the proposals in detail. Reference questions were developed and reference checks were assigned to each person. The team members were asked to report back on April 1 with their results and recommendations. A full report of the team's findings and the reasons for this recommendation are found in Attachment A.

#### **ATTACHMENTS**

Attachment A: Report and Recommendation – Fixed Asset Inventory Services

Resolution #11-30, A Resolution Approving a Service Contract with Probar, a Division of Bondurant Enterprises, Inc., for Fixed Asset Inventory Services in an Amount Not to Exceed \$158,000

**THIS PAGE INTENTIONALLY LEFT BLANK**

## Fixed Asset Inventory Services RFP Results and Recommendations

May 26, 2011

---

### BACKGROUND

The Sacramento Public Library Authority received a finding in the fiscal year 2009-10 financial audit that a complete inventory of fixed assets should be performed. The Authority has a limited recorded inventory of fixed assets at this time, consisting of all Information Technology (IT) equipment and a small number of miscellaneous items. A complete inventory consisting of counting, tagging and assigning a value to each piece of furniture and equipment in library facilities, and then recording that inventory into the agency's enterprise software (Eden), has never been performed.

Library Authority staff developed a Request for Proposal (RFP) to perform this work. It was distributed on February 25, 2011 with a response date of March 18 at 3 pm. Four proposals were received by the deadline, and a review team was assembled to research the proposals and references and to make a recommendation. The team members were:

1. Alan Worthy, IT Supervisor
2. Pat Samsell, Finance Management Consultant
3. Don Tucker, Director of Facilities
4. Rick Smith, Sacramento County Capital Construction Budget Manager

The team met on March 25 and discussed the proposals in detail. Reference questions were developed and reference checks were assigned to each person. The team members were asked to report back on April 1 with their results and recommendations.

### RESULTS AND RECOMMENDATIONS

#### 1. Probar, 9300 Annapolis Road, Lanham, MD, \$157,815

Probar was found to be the most responsive proposer, with the most complete list of requested services and the strongest reference history. Although not the lowest priced proposal, the review team had confidence in the company's ability to produce the desired result within the specified time schedule. Specific points called out in the proposal were:

- All furnishings and equipment with a purchase value of over \$5,000 would be tagged with RFID tag technology as specified in the RFP, but also with a barcode and text on the tag stating "Property of SPLA or other preferred text". Items with a purchase value of under \$5,000 will be tagged with barcode tags only, not RFID. This change of scope was identified during the review process as a cost-saving measure.
- The Probar service approach was clearly defined. The firm demonstrated that they had performed similar work for other institutions and were well prepared to provide the services specified.
- The software interface that allows export into Eden is Web based, and the data can be accessed without proprietary software or ongoing license fees.
- The proposal included all necessary hardware to perform future inventory adds, deletes or edits by Library staff.

- Training services were included in the proposal.
- The references were excellent. We received comments such as:
  - “Very satisfied with the service. One issue that arose during the inventory was resolved promptly and to our satisfaction. Probar was very professional and worked through any issues. They are very flexible in their scheduling to meet our schedule.” *Matt Smith, Arlington Public Schools*
  - “The school system folks are very pleased with Probar and described their customer service and response to issues as outstanding. (The school’s inventory is) stored on the Probar system. Additions and deletions are maintained by the school. Very satisfied with Probar.” *Adam Manne, Alexandria City Public Schools*

### **2. AssetWorks, 6404 Wilshire Blvd. Suite 650, Los Angeles, CA, \$125,500 plus equipment**

AssetWorks offered the lowest cost proposal but most team members found them to be unresponsive because the proposal did not include tagging of all items as stated in the RFP. AssetWorks proposed to tag each item with a value of over \$500. Large lots of identical items, such as meeting room chairs and tables, would not be tagged but instead listed as a single line item. The proposal cost was based largely on the number of tags used, making it difficult to assess the final cost to the Library. Future inventory adds, deletes or edits would need to be performed through the firm’s proprietary software, incurring an ongoing license cost to the Library.

Only one of the references listed for AssetWorks returned the team’s calls or emails. Joe Hall from the City of Gilroy said: “(The City of Gilroy) has been generally happy with the service. They pay a fee of \$6,000 - \$7,000 per year for the services. AssetWorks provides the City of Gilroy with three paper copies of its inventory annually. If the total equals the City’s financial system (Pentamation) then there are no problems.”

### **3. Denali, 17735 NE 65<sup>th</sup> St., Suite 130, Redmond, WA, 98052, \$336,950**

The costs for service through Denali were very high, too high to be competitive with Probar. Their services were called out as listed in Attachment A in the Appendix, but the Appendix did not include an Attachment A. The list of references provided was incomplete, with incomplete company names, no individual names and no contact information.

### **4. Indus Systems, 2352 Main St., Concord, MA 01742, \$357,860**

Indus Systems offered the most expensive proposal, with much of the cost itemized as a \$3.00 per asset item labor cost. The proposal included rental of the inventory equipment, not purchased as specified in the RFP. The significantly higher cost than Probar without the inclusion of equipment makes the Indus Systems proposal non-competitive.

## **CONCLUSION**

The review team recommends Probar for the Library’s Fixed Asset Inventory service. The quality of the proposal, combined with the strong references and comparatively low cost makes Probar’s the strongest proposal.



**RESOLUTION NO. 11-30**

Adopted by the Governing Board of the Sacramento Public Library Authority on the date of:

**May 26, 2011**

**A RESOLUTION APPROVING A SERVICE CONTRACT WITH PROBAR, A DIVISION OF BONDURANT ENTERPRISES, INC., FOR FIXED ASSET INVENTORY SERVICES IN AN AMOUNT NOT TO EXCEED \$158,000**

BE IT HEREBY RESOLVED BY THE GOVERNING BOARD OF THE SACRAMENTO PUBLIC LIBRARY AUTHORITY AS FOLLOWS:

1. A service contract with Probar, a division of Bondurant Inventory Services, Inc., for fixed asset inventory services in an amount not to exceed \$158,000 is approved.
2. The Library Director is authorized to sign all documents related to this contract within the approved terms.

\_\_\_\_\_  
Sandy Sheedy, Chair

ATTEST:

Rivkah K. Sass, Secretary

By: \_\_\_\_\_  
Brenda Haggard, Assistant Secretary

**ATTACHMENTS:**

None.