OCLC WorldShare Management Services Proposal

August 1, 2013

Yosemite Community College District

Modesto Junior College, OCLC Symbol: CCM
Columbia College, OCLC Symbol: CCY

Teresa Scott
Executive Vice Chancellor
Yosemite Community College District
2201 Blue Gum Avenue
Modesto CA 95358

OCLC is pleased to offer Yosemite Community College District information and pricing for OCLC WorldShare Management Services, a fully integrated network solution in support of crucial library operations. WorldShare Management Services will provide the library's collection management needs for circulation, patron management, acquisitions inventory control, vendor management, and reporting.

OCLC WorldShare Management Services will assist libraries by providing:

- A hosted, scalable, Web-based platform for all basic library management functionality.
- Webscale services for acquisitions and circulation.
- A unified management platform for all types of materials that eliminates the need to switch applications when processing different material types.
- A flexible and customizable workflow platform that can be tailored for your organization.
- Increased collaboration and decision making by enabling the sharing of application and data between OCLC member libraries.
- A sophisticated Service-Oriented Architecture (SOA) for interoperability with local environments and third-party business process systems including financial management, HR systems, and course management - so you don't have to reinvent what you're already doing.
- A reduction in the time and money spent managing hardware and software by leaving system management to OCLC.

OCLC WorldShare Management Services will assist end users by providing:

- A single interface for patrons—they don’t need to jump between multiple systems to search different kinds of materials or to make requests.
- Fast, seamless access to the most appropriate delivery options so users have direct access to electronic content, circulation activities and resource sharing without having to know your library’s workflows.
- Search results with the easiest-to-get items first and access to WorldCat libraries worldwide.
- Delivery of your library's resources at the point of need. Your search box can be placed on any Web page or Web-enabled workspaces, such as eLearning courses.
- Simple keyword search and global social-networking tools, such as list sharing, reviews, ratings and personal profiles.
- Increased Web visibility for your library because users can reach your library from Google, Yahoo! and other partner websites via the WorldCat.org platform.

OCLC is proposing a dynamic solution that includes unlimited OCLC cataloging, unlimited Interlibrary lending and borrowing, and Web exposure of the library's holdings to further the goals and mission of Yosemite Community College District:
### Solution Details

<table>
<thead>
<tr>
<th>Service</th>
<th>Year 1**</th>
<th>Year 2**</th>
<th>Year 3**</th>
<th>Year 4**</th>
</tr>
</thead>
<tbody>
<tr>
<td>OCLC WorldShare Management Annual Subscription Service *</td>
<td>$40,372</td>
<td>$40,372</td>
<td>$42,391</td>
<td>$44,510</td>
</tr>
<tr>
<td>Community College League of California Multiple Library Discount****</td>
<td>($4,618)</td>
<td>($4,618)</td>
<td>($4,849)</td>
<td>($5,091)</td>
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<tr>
<td>OCLC WorldShare Management Implementation Service (One Time Cost) ***</td>
<td>$40,236</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td><strong>Total</strong></td>
<td>$75,990</td>
<td>$35,754</td>
<td>$37,542</td>
<td>$39,419</td>
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</tbody>
</table>

*OCLC WorldShare Management Service includes the following services:
- Unlimited cataloging through OCLC Cataloging service
- Unlimited interlibrary loans through OCLC WorldCat Resource Sharing
- OCLC Access
- OCLC WorldCat on FirstSearch and web exposure of the library's holdings
- OCLC Unlimited Print and Electronic Acquisitions with serials control
- OCLC Unlimited Circulation and Delivery
- OCLC WorldCat Local next generation discovery interface, including the new WorldCat Local mobile interface

**Pricing is valid through August 15, 2013. OCLC’s fiscal year is July 1st through June 30th. Year 1 represents the year in which your library goes into production on WMS (the “In-Production Date”) (meaning implementation is complete and the 30-day test period following implementation has passed with no significant issues). The price for Year 1 is the annual amount and will be prorated based on the number of months left in the fiscal year upon the In-Production Date. Implementation will be billed 50% upon receipt of WMS order and the remaining 50% when implementation is complete. The final In-Production Date will be determined in conjunction with your implementation team. The final In-Production Date will be based on availability at the time the contract is signed.

***The WMS implementation price is based on your library implementing as part of a cohort, which normally consists of 7 to 8 libraries. This price includes implementation, configuration, and training, as well as data migration services. Yosemite Community College District would appoint one person to serve as the Yosemite Community College District cohort representative and then that appointed person would train the other Yosemite Community College District librarians. Please see and initial Attachment A, which contains additional details regarding the assessment of your data migration. Should changes occur to your data migration information or should additional requirements be requested during the implementation process, OCLC reserves the right to reassess the implementation pricing and additional charges may occur.

**** Yosemite Community College District has the option of participating in a WorldShare Management Services Multiple Library Discount Program if the WorldShare Management Services proposal and terms and conditions are signed. The Multiple Library Discount Level for the 2013-2014 year (July 1-June 30) is 15%. The discount will apply to the portion of your WorldShare Management Services subscription that is new; that is, the discount does not apply to existing subscription amounts or implementation. As libraries continue to join the Community College League of California, the Multiple Library Discount will be adjusted for the following year based on the number of participating libraries as of June 30, 2014. The following discount schedule will apply for FY14:

<table>
<thead>
<tr>
<th>Multiple Library Discount Levels</th>
<th>Discount</th>
<th>Your Library’s New Amount</th>
<th>Total Discount</th>
</tr>
</thead>
<tbody>
<tr>
<td>6-10 Contracts Signed</td>
<td>10% Discount</td>
<td>$30,785</td>
<td>($3,079)</td>
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<tr>
<td>11-20 Contracts Signed</td>
<td>15% Discount</td>
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<td>21-40 Contracts Signed</td>
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<td>41-60 Contracts Signed</td>
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<td>61-80 Contracts Signed</td>
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<td>More than 80 Contracts Signed</td>
<td>35% Discount</td>
<td>$30,785</td>
<td>($10,775)</td>
</tr>
</tbody>
</table>

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As with all OCLC services, WorldShare Management Service libraries may be asked, but are not required, to:

- Co-author a case study on OCLC WorldShare Management Services implementation and use
- Provide formal feedback on functional requirements for features being developed
- Participate in conference and online presentations related to your experience
- Serve as a reference organization for others interested in WorldShare Management Services

OCLC looks forward to expanding our partnership with Yosemite Community College District by providing a comprehensive solution that will deliver library resources to library patrons at the point of need. Upon signed return of this proposal, an OCLC Implementation Manager will work closely with you to create a plan and schedule to get your WorldShare Management Services operational. Activities will include data migration, configuration, training, testing and the creation of templates to assist in developing a marketing and promotion strategy if desired. The library will also be required to agree to the WorldShare Management Service Terms and Conditions, a copy of which accompanies this Proposal.

If you have questions or need additional information, please contact your Library Services Consultant, Mike Ahern at 1-877-309-8627 or via email at michael_ahern@oclc.org.

Sincerely,

Bruce Crocco
Vice President, Library Services for the Americas
Bruce_Crocco@oclc.org

By signing and returning to OCLC, Yosemite Community College District accepts this proposal:

Teresa Scott
Executive Vice Chancellor
Yosemite Community College District

Date 8/15/2013
Thank you for providing OCLC with information related to your existing ILS data. Based on that information, the following data migration assumptions were made in preparation of this proposal:

- Library will deliver bibliographic records in MARC 21 format. MARC data will need to adhere to OCLC Bibliographic Formats and Standards. For more information on MARC 21 format, please visit: [http://www.loc.gov/marc/bibliographic/ecbdhome.html](http://www.loc.gov/marc/bibliographic/ecbdhome.html) and for more information on OCLC Bibliographic Formats and Standards, please visit: [http://www.oclc.org/bibformats/en/about/](http://www.oclc.org/bibformats/en/about/).
- The Library’s translation table contains 3 locations and approximately 40 ILS shelving location codes.
- Item types are not used to set the Library’s circulation policy.
- The Library’s serials collection is bar-coded.
- The Library’s serials collection is circulating.
- OCLC will create/load Local Holdings Records (LHRs) for approximately 105,800 items via one or multiple batch load projects appropriate when migrating from SirsiDynix Symphony systems.
- OCLC will migrate patron data from a file delivered by the Library in either tab-delimited or XML format.
- OCLC will not migrate circulation transactional data.
- Acquisitions data will not be migrated.

Should changes occur to your data migration information above or should additional requirements be requested during the implementation process, OCLC reserves the right to reassess the implementation pricing and additional charges may occur.