

**STATEMENT OF NEED (SON)**  
**DEPARTMENT OF VETERANS AFFAIRS (VA)**  
**James A. Haley Veterans' Hospital and Clinics Library Service (142D)**  
**Medical Journal Subscriptions**

**BACKGROUND**

The James A. Haley Veterans' Hospital, Tampa, FL (JAHVA) desires to become more efficient in maintaining its subscriptions from multiple publishers. The JAHVA Library Service requires the services of a contractor with established relationships with publishing houses to provide basic journal subscription service, required support, and specialized electronic access services in support of Veterans' care, to fulfill requirements for e-journal periodical subscriptions. These subscriptions are required to assist staff at the James A. Haley Veterans' Hospital and Clinics in conducting health services research, preparing reports and providing other knowledge-based information documents.

**1. SCOPE OF WORK**

- 1.1.** The scope of this effort falls in line with VA's mission, goals and objectives in support of providing Veterans' care.
- 1.2.** The Contractor shall be responsible for the management, labor and equipment necessary to provide subscriptions for databases, e-books, e-journals, point-of-care and other related online services from multiple publishing houses to the James A. Haley Veterans' Hospital Library Service.
- 1.3.** Subscriptions shall include single or multiple addresses for domestic and foreign periodicals and related services.
- 1.4.** Related services include paying publishers, handling claims for non-receipt, cancellations, submission of required reports and other service problems.

**2. APPLICABLE DOCUMENTS**

- 2.1.** Documents referenced or germane to this Statement of Need (SON) are listed below.
- 2.2** The contractor shall be guided by the information contained in the documents in performance of this SON.
- 2.3.** Sections 508 of the Rehabilitation Act (29 U.S.C. § 794d), as amended by the Workforce Investment Act of 1998 (P.L. 105-220), August 7, 1998.

**3. DEFINITIONS**

- 3.1.** Back Orders: Orders that could not be filled by the supplier when originally placed are kept on file pending availability of the material.
- 3.2.** "Bill-Laters": A type of continuation in which a Contractor does not bill a library customer until the publisher has confirmed the price and/or availability of the item(s).

**3.3. Consignee:** The location to which items are shipped.

**3.4. Contractor:** The organization providing subscription services to the Department of Veterans Affairs (VA).

**3.5. Database:** A subscription service that assembles knowledge-based information from a variety of source types. These types can include any mixture of e-books, e-journals, drug information, patient handouts, news updates, and/or videos in any format or content in any type developed specifically for the database. Cross-searching across all of these sources is usually available.

**3.6. e-book:** A book-length publication in digital form, consisting of text, images, or both, and produced on, published through, and readable on computers or other electronic devices.[1] Sometimes the equivalent of a conventional printed book, e-books can also be born digital. The Oxford Dictionary of English defines the e-book as "an electronic version of a printed book,"[2] but e-books can and do exist without any printed equivalent. E-books are usually read on dedicated hardware devices known as e-Readers or e-book devices. Personal computers and some cell phones can also be used to read e-books.

**3.7. E-journal:** Electronic serials, are scholarly journals or intellectual magazines that can be accessed via electronic transmission. In practice, this means that they are usually published on the Web. They are a specialized form of electronic document, they have the purpose of providing material for academic research and study, and they are formatted approximately like journal articles in traditional printed journals.

**3.8. Licensing:** Terms and conditions required by the owners of proprietary systems, software or intellectual property regarding the terms of its use.

**3.9. Online Claiming:** Computer-to-computer interactive communication to determine the current status of individual subscriptions, to register service complaints, and/or to facilitate communication between library staff and contractors.

**3.10. Periodical:** A serial appearing or intended to appear indefinitely at regular or stated intervals, generally more frequently than annually, each issue of which is numbered or dated consecutively and normally contains separate articles, stories or other writings. Serials may be published in any medium or format (including electronic, print, microform, or other non-print media), and may be available through purchase (as with traditional print magazines) or license (as with online journals).

**3.11. Publisher Price:** The established publisher's list price for the given subscription period at the time of order acceptance; the price at which a publication is made available

to the public. It is established by the publisher and is exclusive of any discount. Loosely, the price quoted by the publisher's catalog.

**3.12. Serial:** A publication in any medium issued in successive parts bearing numerical or chronological designations and intended to be continued indefinitely. Serials include: periodicals, newspapers, magazines, annuals, yearbooks, journals, memoirs, proceedings, transactions, and numbered monographic series and other serially published works.

**3.13. Subscription:** The term subscription, as used in this agreement, means a payment for access to or ownership of knowledge-based information, in a time limited or permanent access. It can take the form of access to online databases, e-books, e-journals, print journals, back file e-journals, and other related services. JAHVA determines the subscription period, publisher permitting, and the contractor shall, for print subscription, place and service it for the life of the subscription plus three months.

**3.14. Supplemental Invoicing:** Billing submitted, on a quarterly basis to cover bill-later titles, unscheduled issues for which publishers charge, etc.

#### **4. PERFORMANCE PERIOD**

The period of performance shall be for:

**4.1** Base Period: April 1, 2018 to December 31, 2018

**4.2** Option Period 1: January 1, 2018 to December 31, 2019

**4.3** Option Period 2: January 1, 2019 to December 31, 2020

**4.4** Option Period 3: January 1, 2020 to December 31, 2021

**4.5** Option Period 4: January 1, 2021 to December 31, 2022

#### **5. PLACE OF PERFORMANCE**

**5.1.** All work shall be performed at the contractor's facilities.

#### **6. TASKS AND DELIVERABLES**

**6.1.** The contractor shall provide all tasks and deliverables as described herein. All deliverables, including draft deliverable shall be submitted to the Contracting Officer Representative (COR).

**6.2** All deliverables, including draft deliverables, shall be submitted in accordance with Section B of the order.

**6.3.** Unless otherwise stipulated, statistical and other technical terminology shall not be used without providing a glossary of terms.

**6.4.** The contractor shall be responsible for providing the number of copies in the media required by the COR for each deliverable.

**6.5.** Written deliverables shall be submitted in electronic copy using Microsoft Office products.

## **7. BASIC SUBSCRIPTION SERVICES**

**7.1.** The contractor shall provide basic subscription services that include all of the tasks necessary to execute and manage orders for new and renewal subscriptions to publications.

**7.2.** These tasks fall into the following four critical areas:

- A.** Ordering subscriptions;
- B.** Serving as the fiscal agent with publishers, including making timely prepayments, processing refunds, claims, supplemental and bill-later charges;
- C.** Ensuring timely and complete delivery of ordered subscriptions; and
- D.** Providing reports and other administrative support for subscriptions management.

## **8. Order and Renewal Services**

**8.1.** The contractor shall provide subscription services for all subscriptions in all media generally available via agents from foreign and domestic publishers, if the ordering customer can supply sufficient publication information. The contractor shall place the renewal orders in an electronic format with the publishers within ten (10) business days of receiving the confirmation list or authorization to order, whichever is later. In those cases where follow up is required by the contractor before an order can be placed, the contractor shall notify the COR within five (5) business days of the problem and resolve in an expeditious manner. The contractor shall supply materials from a wide range of publishers, to include, but not limited to:

- A.** Medical publishers
- B.** General circulation periodical publishers
- C.** Trade publishers
- D.** University presses
- E.** Societies and Associations, Scientific
- F.** Societies and Associations, Non-Scientific
- G.** Small Presses
- H.** Non-paper format publishers
- I.** Government agencies
- J.** Quasi-Governmental organizations (e.g., United Nations, World Health Organization)

**9.** Subject areas will include materials in the following listing of subject/categories (not intended to be all inclusive):

- A.** Health Sciences
- B.** Allied Health Sciences
- C.** Social and Behavioral Sciences
- D.** Science and Technology
- E.** Management
- F.** Business and Administration
- G.** Marketing
- H.** General Interest

## **10. Subscription Periods**

**10.1.** Publisher permitting, the contractor shall be required to place subscriptions at any time during the year, to provide common expiration dates for initial subscription and renewals whenever possible, and to assist in prorating for common expiration dates.

**10.2**The contractor shall provide administrative and other services for each subscription placed until three months after its expiration or for the life of the subscription (e.g., the publication of the last issue covered by that subscription period).

## **11. Order Placement**

**11.1.** In support of basic order and renewal services, the contractor shall perform the following services and provide products as described below.

**11.2.** Subscription Renewal Lists - At a minimum, the contractor shall be able to provide a renewal list as described below. The contractor may propose other formats which JAHVA may, at its discretion, choose instead. The lists shall be provided in MS Excel format. with optional print delivery. JAHVA provides the contractor listings by multiple ship-to addresses by category, i.e., medical, general, administrative; the contractor shall respond to the lists in the same manner. The listings shall be on separate pages for each "Ship to" address, shall list alphabetically all subscription titles ordered or on record for that consignee, and shall contain the following information:

- A.** Complete "Bill to" and "Ship to" address
- B.** Purchase order number
- C.** Title

**D. Quantity**

**E. Subscription Period based on JAHVA Data**

**F. New, Renewal, Subscription added or Transfer**

**G. Price:** To contain latest known publishers' rates currently available, and the date for which that price was obtained. Indicate if publications are free to the Government or other institutions and how to obtain them, include titles which are part of memberships and/or combination subscriptions, and titles available direct from publisher only.

**H. Service fee**

**I. Frequency**

**J. Bibliographic status of those titles currently under review for renewal**

**K. All additional titles which may not be due for renewal, but which are on record for a specific consignee**

**L. Renewal documents;** to contain an 80 character capacity local information field or fields for the storing of unique data for each title (e.g., internal fund accounting, subject identification, VA assigned numbers)

**M. Listing of any "direct only" titles, or titles which the contractor cannot supply**

**N. Listing of "standing order" or "billed as published" titles**

**O. Documented constraints (i.e., irregular publication, discontinued, volume year or calendar year basis only, publisher will not pro-rate, no refund available,) shall be noted on subscription listing**

**P. International Standard Serial Number (ISSN) or International Standard Book Number (ISBN)**

**Q. Publisher**

## **12. Catalog**

**12.1.** The contractor shall provide an annual catalog of periodical titles available. The catalog shall be available to the customer electronically, e.g., via Internet and at no additional charge to the agency. The catalogs shall have as a minimum the following information:

**A. Titles**

**B. ISSN or ISBN**

- C. Cost
- D. Frequency
- E. Enumeration
- F. Descriptive Information (e.g., title changes with cross references; memberships, if available; publisher, if available)
- G. Documented constraints
- H. Instructions for electronic access to the publications

### **13. Notification Of Ceased Or Discontinued Titles**

**13.1.** The contractor shall notify the COR of any ceased or discontinued titles within 30 calendar days.

### **14. Payment**

**14.1.** The contractor shall pay all regular subscription orders in advance to the publishers or in accordance with the publisher's agreement, prior to submission of the first invoice. Upon request, the contractor shall provide proof of payment of any order invoiced. Changes and frequency of publications will not be justification of additional costs.

### **15. Administrative Services**

**15.1.** The contractor shall provide the following administrative services to support subscription ordering services.

### **16. Claims For Missing, Defective Or Mutilated Issues**

**16.1.** The contractor shall be the contract liaison for JAHVA in obtaining from the publisher replacement copies of periodicals found to be defective, mutilated, lost in transit, or otherwise missing, provided the loss is reported within sixty business days.

**16.2.** The contractor shall provide back issue ordering if requested.

**16.3.** The contractor shall notify publishers within one (1) business day of receiving a claim.

**16.4.** The contractor shall offer electronic claims services at no additional charge.

**16.5.** The contractor shall, upon request of the Government, demonstrate or make available for review its electronic claims system prior to purchase order award.

**16.6.** The contractor shall provide the VA with the necessary training and written documentation to enable the VA to effectively use the electronic claims system.

**16.7.** The contractor shall supply VA and all "ship-to" addressees with full service assistance in claiming missing issues.

**16.8.** The claim notice sent from the contractor to the publisher shall include the following information:

C. Title being claimed

**B.** Specific issues

**C.** Date of Contractors' order to publishers

**D.** Order period

**E.** Amount paid

**F.** Proof of payment

**G.** Change of address, if any

**16.9.** The contractor shall handle claims for any subscription for up to three (3) months after the life of the subscription.

## **17. Refunds For Lost Periodicals, Replacements And Discontinuance Of Publication**

**17.1.** In the case where replacement is unavailable and refunds are offered instead, the contractor shall make a refund in full of all amounts paid by JAHVA. The contractor shall provide refunds or substitute materials from publishers for unexpired portions of subscriptions which discontinue publication during the life of the subscription.

## **18. Refunds For Cancellations**

**18.1.** When a refund has been requested due to timely cancellation (in accordance with the agreed upon cancellation/refund policy of the publisher) of a subscription, the contractor shall provide refunds to JAHVA. The contractor shall provide JAHVA with the option of receiving a refund or accepting a credit when refunds are due.

## **19. Duplicate Issues**

**19.1.** The contractor shall deal directly with the publisher to correct duplicate issue errors.

## **20. Bill-To and Ship-To Addresses**

**20.1.** The contractor shall support multiple shipping addresses, domestic and foreign, under one billing address. JAHVA addresses shall have the capacity for up to five (5) lines, with each line up to 30 characters.

## **21. Change Of Address**

**21.1.** The contractor shall notify the publisher of changes of address within five (5) business days of notification by the consignee.

## **22. Membership Entitlements**



**22.1.** The contractor shall note in the invoice all publications and/or materials received through memberships (e.g., title, frequency, quantity of each publication, and special membership benefits).

### **23. Sample Copies**

**23.1.** The contractor shall request sample copies of periodicals when requested to do so by JAHVA. The contractor shall also provide pertinent information on new titles.

### **24. Back Issues**

**24.1.** Upon request from JAHVA, the contractor shall acquire back issues of a title for up to one (1) year prior to the date of the current volume.

### **25. Contractor Representative**

**25.1.** The Contractor shall assign a representative by name to provide personalized assistance for the JAHVH account. The personal representative shall provide assistance between 8:00 a.m. and 4:30 p.m., Eastern Time Zone.

**25.2.** The contractor shall assign one Project/Program Manager to work directly with the JAHVA COR regarding all accounts. The Project/Program Manager shall participate in quarterly status meetings where outstanding or unresolved issues will be addressed.

### **26. Toll-Free Telephone Number**

**26.1.** The contractor shall provide a toll-free telephone line for JAHVA to utilize in contacting their contractor's representative between 8:00 a.m. and 4:30 p.m. Eastern Time. The contractor shall respond to the CO, COR, or JAHVA messages within 24 hours or the next business day.

### **27. Information Bulletins**

**27.1.** The contractor shall provide monthly email information bulletins updating the latest known information on various publication titles, to minimally include:

A. Ceased publications

B. Suspended publications

C. Publication delays

D. Publishing frequency changes

- E.** Title changes
- F.** Title mergers or absorptions
- G.** Title splits
- H.** Price changes

## **28. Other Communication with JAHVA**

**28.1.** The contractor shall email all administrative information not covered in information bulletins (excluding claims) to the COR.

## **29. Library Management Reports**

**29.1.** Specifications – Determined at the order level at no additional charge and on demand, the contractor shall provide listings containing all or part of the following information as specified by JAHVA, and shall describe their capabilities to provide listings and reports in the desired MS Office format.

- A.** Title
- B.** Ship-to-address
- C.** Invoice-item number
- D.** Purchase order (PO) number
- E.** Subscription period
- F.** Quantity
- G.** Frequency
- H.** Price with adjustments and estimates
- I.** Volume
- J.** ISSN or ISBN
- K.** Publisher

**29.2.** Sorting - In addition, the contractor's reports shall be formatted so that JAHVA has the capability of sorting, subtotalling and retotaling the reports by any of the above included fields of information.

**29.3.** Medium – the contractor shall provide reports in the desired MS Office format.

**29.4.** Minimum Required Reports - At a minimum, the contractor shall provide the following reports at no charge:

**29.5.** Claims List – Determined at order level, the contractor shall provide to the VA a monthly listing of all outstanding claims and any responses received from the publishers. The report shall be cumulative, by title, for all unresolved claims.

**29.6.** Subscription Status Information – Determined at the order level, the contractor shall notify the JAHVA in writing of any irregularity or change in subscription status, such as: “bill-later,” non-cancelable, slow, irregular, discontinued, order direct, standing order, split title, not due for renewal at this time, period restricted, establishing contact with publisher, temporarily suspended publication, foreign title, estimated price, and price increases since last billing published price on a monthly basis.

**29.7.** Consolidated Reports – JAHVA will monitor local deliverables. The contractor shall provide the following annual reports to the COR:

**29.8.** Information on economic factors affecting coming year prices, such as forecasted publisher price increases, exchange rates, and other information for both domestic and foreign medical publishers.

**29.8.** The contractor shall maintain complete records of all bibliographic and financial transactions for the life of the order. The contractor shall provide to VA immediate access to these records on demand. If required by VA, the contractor shall provide copies of these documents at no cost. The contractor shall retain the original records on-site.

### **30. REQUIRED SUPPORT SERVICES**

**30.1.** The contractor shall provide support to cover a range of subscription related products and services to the libraries, in addition to basic subscription order and renewal services described under paragraph 5.1, Basic Subscription Services. The contractor shall offer, and customers may require, the following items at an additional charge.

### **31. Journal Check-In**

**31.1.** An electronic check-in system shall be made available. The following functions shall be provided:

- A.** Complete bibliographic information
- B.** Check-in (new issue receipt)
- C.** Routing (journal issue and table of contents)
- D.** Claiming
- E.** Fund control (purchase/budget information)
- F.** Holdings records

**G.** Machine Readable Cataloging (MARC) records, Z39.50 compliant

**H.** Reports

**I.** Alphabetical journal list

**J.** Journal list by Contractor

**K.** Journal holdings

**L.** Periodicals receipt for specified date range

**M.** Prediction pattern

### **32. Marc Record Data**

**32.1.** The contractor shall provide electronic files of catalog data in MARC format with local holdings data, for loading into customer's local system. The contractor shall have the ability to provide stable and accurate URLs either in title list format or included in the 856 field of the MARC record.

### **33. Personnel**

**33.1.** The contractor shall ensure that key personnel have at least three (3) years of experience in servicing organizations similar in size, scope, and complexity to JAHVA. Past experience in servicing clients in the health sciences fields is required. The position of Representative is considered key personnel.

### **34. Electronic Data Records**

**34.1.** The contractor shall have the capacity to maintain accurate and current information regarding periodical titles, prices, publisher information, claims status, billing and financial information, communication with consignee locations, address and mailing list maintenance.

### **35. Financial Resources**

**35.1.** The contractor shall have the financial resources to pay publishers in full and in advance for all JAHVA orders placed with them. The contractor shall further demonstrate sufficient equity and/or credit lines to guarantee prepayment to publishers. The availability of equity and/or credit lines to cover debts incurred in fulfilling all obligations under this award shall be certified to the Contracting Officer prior to the award.

### **36. GENERAL REQUIREMENTS**

**36.1.** Method And Distribution Of Deliverables

**36.2.** The contractor shall deliver documentation in electronic format, unless otherwise directed in Section B of the solicitation/order. Acceptable electronic media include

current versions (2013-2016) of these programs: MS Word, MS Excel, MS PowerPoint, MS Project, MS Access, and Adobe Postscript Data Format (PDF).