



LIBRARY OF VIRGINIA

Sandra Gioia Treadway
Librarian of Virginia

STANDARD CONTRACT LVA-MAT-22-007

This Contract entered by Baker & Taylor, LLC, 2810 Coliseum Centre, Suite 300, Charlotte, NC 28217 hereinafter called the "Contractor" and Commonwealth of Virginia (Commonwealth) through the Library of Virginia, 800 East Broad Street, Richmond, Virginia 23219 on behalf of Mid-Atlantic Library Alliance, Inc. hereinafter called the "Library or LVA" and "MALiA".

WITNESSETH that the Contractor and the Library, in consideration of the mutual covenants, promises and agreements herein contained, agree as follows:

SCOPE OF CONTRACT: The Contractor shall provide goods/services to the Purchasing Agency as set forth in the Contract Documents.

PERIOD OF PERFORMANCE: July 1, 2022 through June 30, 2025 with two one-year optional renewals.

The contract documents shall consist of the following and will be incorporated herein:

1. This signed form,
2. The following portions of the Request for Proposals dated February 1, 2022 and
 - a. The Statement of Needs
 - b. The General Terms and Conditions
 - c. The Special Terms and Conditions
 - d. Attachment B
 - e. Attachment C
 - f. Addendum #1
3. The Contractor's Proposal dated March 1, 2022 and negotiation points dated April 7, 2022.

STATUS OF PERSONNEL: MALiA has been designated as the Library administrator for this Agreement.

IN WITNESS WHEREOF, the parties have caused this Contract to be duly executed intending to be bound thereby.

CONTRACTOR:		LIBRARY	
Signature:	<i>Lee Ann Queen</i>	Signature:	<i>Daniel K. Hinkley</i>
Title:	<i>Director Pricing Services</i>	Title:	<i>Deputy, FAS</i>
Date:	<i>4-12-2022</i>	Date:	<i>4/13/22</i>

Note: This public body does not discriminate against faith-based organizations in accordance with the *Code of Virginia*, § 2.2-4343.1 or against a bidder or offeror because of race, religion, color, sex, national origin, age, disability, sexual orientation, gender identity, political affiliation, or veteran status or any other basis prohibited by state law relating to discrimination in employment.

800 East Broad Street
Richmond, Virginia 23219

www.lva.virginia.gov

804.692.3500 phone
804.692.3976 fax



Sconzo, Nancy <nancy.sconzo@lva.virginia.gov>

RE: LVA-MAT-22-007

1 message

Lee Ann Queen <LeeAnn.Queen@baker-taylor.com>
To: "Sconzo, Nancy" <nancy.sconzo@lva.virginia.gov>

Thu, Apr 7, 2022 at 8:22 AM

Hello Nancy,

Thank you for your inquiry. Responses are listed underneath the questions below.

Please let me know if we can provide any other information.

Thank you for your consideration.

Kind Regards,

Lee Ann

Lee Ann Queen

Director – Pricing Services

Baker & Taylor

E-Mail: QueenL@baker-taylor.com

From: Sconzo, Nancy <nancy.sconzo@lva.virginia.gov>
Sent: Monday, April 4, 2022 8:20 AM
To: Lee Ann Queen <LeeAnn.Queen@baker-taylor.com>
Subject: LVA-MAT-22-007

Good morning,

The purpose of this email is to negotiate a possible contract between the LVA/MALiA and your company Baker & Taylor.

LVA/MALiA has several negotiation/clarification points we would like to discuss. Please note that this is **not** an offer of award and these negotiation points have been selected by the panel.

Panel would like clarification for page 22 – instructions for accessing Online Selection List and Catalog Listings don't match the current website. The vendor would like an update or omit.

My apologies, our website has been redesigned since the proposal was submitted. Title lists and publications/catalogs are accessible in a cart format via our Title Source website (catalogs are also available in a browsing view, turning pages in a digital magazine). From the Title Source site, select BROWSE from the top bar. From the drop down, you may select categories to review various selection lists, catalogs, genre lists, and BISAC lists. For catalogs, select *B&T Publications*, and click on a catalog. You may then choose to view cart listings from the catalog, or, to view the digital magazine, click on the PDF icon under *Select Issue*.

Please see below for access to our Title Source database. As this is a trial ID, it is not attached to any live accounts.

Login: MALIA123

Password: Password1

URL = <https://ts360.baker-taylor.com>

Please let me know if additional ids are desired.

The Panel would like discounts offered on print books for K-12 school libraries.

Baker & Taylor services Public , Special, and Academic libraries, and our response is geared to the support of these member libraries. Our proposal does not include K-12 schools for any products bid. I apologize that our intent for member coverage was not properly communicated.

The panel would like to lower the cost of the audiobook CD Media processing package by 50%. Currently the processing package is \$6.79 per unit vs \$2.65 for music CD.

The cost to process audiobook CD material is significantly higher than that of Music CD product. Audiobooks on CD often contain between 10-15 discs and require cases and sleeves to accommodate the larger number of discs. We respectfully request to leave this pricing as originally submitted.

Page 51 and 52 references areas where Baker & Taylor are sole source providers. Please provide documentation on letterhead stating that Baker & Taylor are sole source provider for Title Source Family of products, PawPrints prebound paperback editions and Axis 360 digital platform.

This statement is attached.

Please remember this process is **confidential** and we ask that you not share this information. We are requesting that you have your response returned by **9:00 a.m. on Thursday, April 7, 2022**.

Thank you.

Nancy Sconzo, VCO, VCA

Contract and Procurement Manager

Library of Virginia

804-692-3710

[800 East Broad Street](#)

[Richmond, VA 23219](#)

Nancy.Sconzo@lva.virginia.gov



BakerTaylor Sole Source Statement 04072022 tc.pdf
257K



April 7, 2022

Nancy Sconzo, VCO, VCA
Contract and Procurement Manager
Library of Virginia
800 East Broad Street
Richmond, VA 23219

Via eMail: Nancy.Sconzo@lva.virginia.gov

RE: Sole Source Information – Title Source 360
 Axis 360 Digital Platform
 PawPrints PreBound Editions

Dear Ms. Sconzo,

Please accept this letter as our statement of sole source for the above referenced products. These are proprietary products, available only from Baker & Taylor.

Title Source 360, Baker & Taylor's web-based bibliographic database, offers access to the most up-to-date title information available. The database features millions of title records and is searchable by keyword, author, title, ISBN, Library Subject, and more.

Axis 360 is a digital content hosting and delivery platform which provides managed access to electronic materials for authenticated users of library resources.

PawPrints PreBound books are rebound editions of the original publisher work, providing a sturdy hardcover and reinforced binding for a longer shelf-life. Bright and attractive covers featuring the original cover art are digitally enhanced and highlighted with an easily cleaned laminate finish. Each PawPrint title carries a unique ISBN.

Thank you for your interest in B&T. Please let me know if you have any questions or if I can provide any other information.

Sincerely,

Lee Ann Queen
Director – Pricing Services

Baker & Taylor
2810 Coliseum Centre Drive, Suite 300
Charlotte, NC 28217
E-Mail: QueenL@baker-taylor.com

REQUEST FOR PROPOSAL (RFP)

Issue Date: February 1, 2022

RFP# LVA-MAT-22-007

Title: Library Books, Music, and Video

Commodity Code: 71510 – Books, Curriculum Guides, Directories, Magazines, Pamphlets, Periodicals, Publications, Reprints, etc.
71512 – Books, Reference (incl. CD versions) Dictionaries, Encyclopedias, etc.
71535 – Electronic Publications: Directories, Dictionaries, Encyclopedia, etc.
71505 – Audio Cassettes, Tapes and Compact Disks (prerecorded)
71590 – Video Cassettes, Disks, Tapes, etc. (For Computer and TV, Prerecorded)

Issuing Agency: Library of Virginia, on behalf of
Mid-Atlantic Library Alliance, Inc. (MALiA)
Purchasing Department
800 East Broad Street
Richmond, VA 23219

Period of Contract: July 1, 2022 through June 30, 2025 with two-one year optional renewals

Submission of Electronic Proposals via the eVA Website will be received until **March 3, 2022 at 2:00 p.m. EST** For Furnishing The Goods Described Herein.

All Inquiries For Information Should Be Directed To: Nancy Sconzo nancy.sconzo@lva.virginia.gov. **No questions will be answered by phone or verbally. No questions will be accepted after 5:00 p.m. on February 15, 2022.**

In compliance with this Request for Proposals and to all the conditions imposed herein and hereby incorporated by reference, the undersigned offers and agrees to furnish the services in accordance with the attached signed proposal or as mutually agreed upon by subsequent negotiation.

DSBSD-certified Small Business No. Not Applicable

Name And Address Of Firm:

Baker & Taylor, LLC
2810 Coliseum Centre Drive – Ste. 300
Charlotte, NC
Zip Code: 28217

Date: March 1, 2022
By: Lee Ann Queen
(Signature In Ink)
Name: Lee Ann Queen

(Please Print)

eVA Vendor ID or DUNS #: VS0000217656
Fax Number: (704) 998-3260
E-mail Address: bids@baker-taylor.com

Title: Director-Pricing Services
Telephone Number: (704) 219-4952

NOTE: This public body does not discriminate against faith-based organizations in accordance with the *Code of Virginia*, § 2.2-4343.1 or against a bidder or offeror because of race, religion, color, sex, national origin, age, disability, sexual orientation, gender identity, political affiliation, or veteran status or any other basis prohibited by state law relating to discrimination in employment. Faith-based organizations may request that the issuing agency not include subparagraph 1.f in General Terms and Condition C. Such a request shall be in writing and explain why an exception should be made in that invitation to bid or request for proposal.

TABLE OF CONTENTS FOR RFP# LVA-MAT-22-007

I.	PURPOSE.....	3
II.	BACKGROUND.....	3
III.	STATEMENT OF NEEDS	3
IV.	PROPOSAL PREPARATION AND SUBMISSION INSTRUCTIONS:	4
V.	EVALUATION AND AWARD CRITERIA	5
VI.	REPORTS	6
VII.	PREPROPOSAL CONFERENCE.....	6
VIII.	GENERAL TERMS AND CONDITIONS	6
IX.	SPECIAL TERMS AND CONDITIONS.....	13
X.	ATTACHMENTS.....	15

- I. PURPOSE:** The purpose of this Request for Proposal (RFP) is for the Library of Virginia to solicit sealed proposals from qualified sources and to establish contract(s) through competitive negotiations with one or more contractors to provide library books, music, and video to member libraries of the Mid-Atlantic Library Alliance, Inc. (MALiA).

This RFP outlines the terms, conditions, and all applicable information required for submitting a proposal. Proposal respondents should pay strict attention to the proposal submission date and time and follow the format and instructions in Section IV (Proposal Preparation and Submission) of this RFP.

- II. BACKGROUND:** MALiA is an organization of public, academic, school, and special libraries, established to provide cooperative information services and programs. Full membership is conveyed to applicant libraries upon payment of annual fees to the corporation.

The Mid-Atlantic Library Alliance (MALiA) represents 221 libraries throughout the mid-Atlantic region, including Virginia, Tennessee, North Carolina, West Virginia, Kentucky, Alabama, and Florida. Membership includes public, academic, school, and special libraries. See Attachment D: MALiA Member Libraries as of January 1, 2022 for a list of participating institutions or consult the MALiA website (<http://www.malialibrary.org/>) for a current list of members.

The purpose of MALiA is to encourage the development and improvement of all types of library service and to promote the efficient use of finances, personnel, materials and properties by enabling governing authorities with library responsibilities to join together in a nonprofit library consortium.

Participation by MALiA members in this Contract is optional and is at the discretion of each participating member. It is understood and agreed between the parties to any agreement resulting from this RFP that any library that becomes a member of MALiA after the award of this Contract will be accepted at any time under the terms of this Contract.

The approximate, combined library supplies budget per year is estimated at over \$3,000,000.00. The approximate stated dollar amount is not to be construed to represent any amount MALiA is obligated to purchase under the resulting contract or relieve the contractor of any obligation to provide service. Dollar amounts may change during the course of the contract and MALiA reserves the right to increase or decrease the amount as actual needs and funding determine.

- III. STATEMENT OF NEEDS** The contractor must be able to provide services necessary to fill orders for library materials placed by any MALiA member library on a consistent basis during the term of the contract.

This RFP covers the following five categories of library materials:

1. Books – Print
2. Books – Electronic
3. Books – Audio
4. Music
5. Video

Library materials are defined for the purpose of this RFP as stated in the 2013 edition of the ALA Glossary of Library and Information Science edited by Michael Levine-Clark and Toni M. Carter:

*Materials, of all physical substances and formats, acquired by a library to constitute its library collection. **Devices for reading, viewing, or hearing the informational content of materials are excluded.***

Participating MALiA member libraries that become dissatisfied with the service received during the course of this contract may withdraw at any time with no penalty.

IV. PROPOSAL PREPARATION AND SUBMISSION INSTRUCTIONS:

A. ESTIMATED TIMELINE

RFP Issue Date	February 1, 2022
Submit Questions by	February 15, 2022
Response to questions posted by	February 17, 2022
URFP Due Date	March 3, 2022
Award of URFP	To Be Determined

All questions pertaining to this Unsealed Request for Proposal shall be submitted via email nancy.sconzo@lva.virginia.gov **No questions will be accepted after 5:00 p.m. on February 15, 2022.**

1. **RFP RESPONSE:** In order to be considered for selection, Offerors must submit a complete response contained in one single PDF to this RFP via the Commonwealth of Virginia's e-procurement website, eVa. Offerors that submit a proposal which contains **Proprietary** and/or **Confidential** information must also submit one additional electronic copy in which Proprietary and/or Confidential information is **REDACTED**. Redacted proposals shall be labeled as such.

The redacted version of the proposal must have all proprietary information deleted that has been marked as proprietary. Section numbers which are redacted should be identified as follows: Example: Section 3, paragraph B: "Redacted". The redacted version of the proposal must be carefully edited, altered, and refined by the Offeror in order to protect and maintain complete confidentiality of protected information. LVA/MALiA will not accept responsibility for any public disclosure of proprietary information that is a result of improper redaction by the Offeror.

ONLY ELECTRONIC RESPONSES WILL BE ACCEPTED and shall be submitted through the eVA Procurement Portal. Proposals received via email and fax **will not** be accepted. If an Offeror requires assistance submitting an electronic response, the Offeror must contact eVA Customer Care at 866-289-7367 or email eVACustomerCare@dgs.virginia.gov. **No other distribution of the proposal shall be made by the Offeror.**

LATE RESPONSES WILL NOT BE ACCEPTED.

2. **PROPOSAL PREPARATION:**

- a. Proposals shall be signed by an authorized representative of the offeror. All information requested should be submitted. Failure to submit all information requested may result in the purchasing agency requiring prompt submission of missing information and/or giving a lowered evaluation of the proposal. Proposals that are substantially incomplete or lack key information may be rejected by the purchasing agency. Mandatory requirements are those required by law or regulation or are such that they cannot be waived and are not subject to negotiation.
- b. Proposals should be prepared simply and economically, providing a straightforward, concise description of capabilities to satisfy the requirements of the RFP. Emphasis should be placed on completeness and clarity of content.
- c. Proposals should be organized in the order in which the requirements are presented in the RFP. All pages of the proposal should be numbered. Each paragraph in the proposal should reference the paragraph number of the corresponding section of the RFP. It is also helpful to cite the paragraph number, sub letter, and repeat the text of the requirement as it appears in the RFP. If a response covers more than one page, the paragraph number and sub letter should be repeated at the top of the next page. The proposal should contain a table of contents which cross-references the RFP requirements. Information which the offeror desires to present that does not fall within any of the requirements of the RFP should be inserted at an appropriate place or be attached at the end of the proposal and designated as additional material. Proposals that are not organized in this manner risk elimination from consideration if the evaluators are unable to find where the RFP requirements are specifically addressed.
- d. As used in this RFP, the terms "must", "shall", "should" and "may" identify the criticality of requirements. "Must" and "shall" identify requirements whose absence will have a major negative impact on the suitability of the proposed solution. Items labeled as "should" or "may" are highly desirable, although their absence will not have a large impact and would be useful, but are not necessary. Depending on the overall response to the RFP, some individual "must" and "shall" items may not be fully satisfied, but it is the intent to satisfy most, if not all, "must" and "shall" requirements. The inability of an Offeror to satisfy a "must" or "shall" requirement does not automatically remove that Offeror from consideration; however, it may seriously affect the overall rating of the Offerors' proposal.

- e. Each copy of the proposal should be bound or contained in a single volume where practical. All documentation submitted with the proposal should be contained in that single volume.
- f. Ownership of all data, materials, and documentation originated and prepared for the State pursuant to the URFP shall belong exclusively to the State and be subject to public inspection in accordance with the Virginia Freedom of Information Act. Trade secrets or proprietary information submitted by an offeror shall not be subject to public disclosure under the Virginia Freedom of Information Act; however, the offeror must invoke the protections of § 2.2-4342F of the Code of Virginia, in writing, either before or at the time the data or other material is submitted. The written notice must specifically identify the data or materials to be protected and state the reasons why protection is necessary. **The proprietary or trade secret material submitted must be identified by some distinct method such as highlighting or underlining and must indicate only the specific words, figures, or paragraphs that constitute trade secret or proprietary information.** The classification of an entire proposal document, line item prices, and/or total proposal prices as proprietary or trade secrets is not acceptable and will result in rejection of the proposal. If, after being given reasonable time the offeror refuses to withdraw an entire classification designation, the proposal will be rejected. (**Attachment G**)

3. **ORAL PRESENTATION :**

Offerors who submit a proposal in response to this RFP may be required to give an oral presentation of their proposal to the agency. This provides an opportunity for the offeror to clarify or elaborate on the proposal. This is a fact finding and explanation session only and does not include negotiation. The issuing agency will schedule the time and location of these presentations. Oral presentations are **an option** of the purchasing agency and **may or may not** be conducted.

B. **SPECIFIC PROPOSAL INSTRUCTIONS :**

Proposals should be as thorough and detailed as possible so that LVA may properly evaluate your capabilities to provide the required goods/services. Offerors shall submit the following items as a complete proposal:

1. Return the RFP cover sheet and all addenda acknowledgments, if any, signed and filled out as required.
2. Completed Offeror Data Sheet (**Attachment A**)
3. Fill out Service Requirement Deemed Important in Consideration of Contractor Selection (**Attachment B**)
4. Offeror Discount Pricing Sheet (**Attachment C**)
5. Small Business Subcontracting Plan (**Attachment E**)
6. Fill out Virginia State Corporation Commission (SCC) Registration information (**Attachment F**)
7. Fill out Proprietary/Confidential Information Identification (**Attachment G**)
8. Must be eVA registered and SBSD certified prior to closing date.

V. **EVALUATION AND AWARD CRITERIA**

A. **EVALUATION CRITERIA**

RFP Reference	Evaluation Criteria	Max Possible Score
Attachment A Offeror Data Sheet, Attachment B Service Requirements, I	Company Data	15
Attachment B Service Requirements, II	Orders and Fulfillment	15
Attachment B Service Requirements, III	Invoices and Payment	10

Attachment B Service Requirements, IV	Overall Cost Considerations	20
Attachment B Service Requirements, V	Customer Service	20
Attachment E Small Business Subcontracting Plan	SWaM	20
	TOTAL	100

B. AWARD OF CONTRACT - see Award Term in Special Terms and Conditions Section VIII –B

VI. REPORTS:

A. Annual report for total usage, as described in Attachment B, V. Customer Service, #10

B. Use of Subcontractors

If the Offeror intends to use subcontractors to perform any portion of the work described in the RFP, the Offeror must clearly state so. LVA/MALiA is placing increased emphasis on its SWaM (Small, Women and Minority Owned) business program and is interested in identifying any potential opportunities that may be available to engage vendors to be certified by the Virginia Department of Small Business and Supplier Diversity (DSBSD) through new or existing contracts. Identify and list any such opportunities that your firm would commit to if awarded this contract in Attachment E Participation in State Procurement Transactions Small Businesses and Businesses Owned by Women and Minority. The Offeror's response must include a description of which portion(s) of the work will be sub-contracted out and the names and addresses of potential subcontractor under the Contract.

By submitting a proposal, Offerors certify that all information provided in response to the Request for Proposals is true and accurate. Failure to provide information required by this Request for Proposal will ultimately result in rejection of the Proposal.

C. Report on the Participation of Small Businesses and Businesses Owned by Women and Minorities

Unless the Contractor is a DSBSD certified small business, the Contractor shall submit annual reports on the direct involvement of DSBSD certified SWaM Businesses in the performance of the contract. The report shall specify the actual dollars spent to date with Small Businesses based on the Contractor's commitment for utilization of SDBSD SWaM business.

The Contractor shall provide this information electronically to:

Nancy Sconzo
Office of Purchasing and Finance
Nancy.Sconzo@lva.virginia.gov

Failure to submit the required information will be considered a contract compliance issue and will be addressed accordingly.

VII. PREPROPOSAL CONFERENCE: Not applicable

VIII. GENERAL TERMS AND CONDITIONS

A. **VENDORS MANUAL**: This solicitation is subject to the provisions of the Commonwealth of Virginia *Vendors Manual* and any changes or revisions thereto, which are hereby incorporated into this contract in their entirety. The process for filing a complaint about this solicitation is in section 7.13 of the *Vendors Manual*. (Note section 7.13 does not apply to protests of awards or formal contractual claims.) The procedure for filing contractual claims is in section 7.19 of the *Vendors Manual*. A copy of the manual is normally available for review at the purchasing office and is accessible on the Internet at www.eva.virginia.gov under "I Sell To Virginia".

B. **APPLICABLE LAWS AND COURTS**: This solicitation and any resulting contract shall be governed in all respects by the laws of the Commonwealth of Virginia, without regard to its choice of law provisions, and any litigation with respect thereto shall be brought in the circuit courts of the Commonwealth. The agency and the contractor are encouraged to resolve any issues in controversy arising from the award of the contract or any contractual dispute using Alternative

Dispute Resolution (ADR) procedures (*Code of Virginia*, § 2.2-4366). ADR procedures are described in Chapter 9 of the *Vendors Manual*. The contractor shall comply with all applicable federal, state and local laws, rules and regulations.

- C. **ANTI-DISCRIMINATION:** By submitting their proposals, offerors certify to the Commonwealth that they will conform to the provisions of the Federal Civil Rights Act of 1964, as amended, as well as the Virginia Fair Employment Contracting Act of 1975, as amended, where applicable, the Virginians With Disabilities Act, the Americans With Disabilities Act and § 2.2-4311 of the *Virginia Public Procurement Act (VPPA)*. If the award is made to a faith-based organization, the organization shall not discriminate against any recipient of goods, services, or disbursements made pursuant to the contract on the basis of the recipient's religion, religious belief, refusal to participate in a religious practice, or on the basis of race, age, color, gender sexual orientation, gender identity, or national origin and shall be subject to the same rules as other organizations that contract with public bodies to account for the use of the funds provided; however, if the faith-based organization segregates public funds into separate accounts, only the accounts and programs funded with public funds shall be subject to audit by the public body. (*Code of Virginia*, § 2.2-4343.1E).

In every contract over \$10,000 the provisions in 1. and 2. below apply:

1. During the performance of this contract, the contractor agrees as follows:
 - a. The contractor will not discriminate against any employee or applicant for employment because of race, religion, color, sex, sexual orientation, gender identity, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment, except where there is a bona fide occupational qualification reasonably necessary to the normal operation of the contractor. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of this nondiscrimination clause.
 - b. The contractor, in all solicitations or advertisements for employees placed by or on behalf of the contractor, will state that such contractor is an equal opportunity employer.
 - c. Notices, advertisements and solicitations placed in accordance with federal law, rule or regulation shall be deemed sufficient for the purpose of meeting the requirements of this section.
 - d. If the contractor employs more than five employees, the contractor shall (i) provide annual training on the contractor's sexual harassment policy to all supervisors and employees providing services in the Commonwealth, except such supervisors or employees that are required to complete sexual harassment training provided by the Department of Human Resource Management, and (ii) post the contractor's sexual harassment policy in (a) a conspicuous public place in each building located in the Commonwealth that the contractor owns or leases for business purposes and (b) the contractor's employee handbook.
 - e. The requirements of these provisions 1. and 2. are a material part of the contract. If the Contractor violates one of these provisions, the Commonwealth may terminate the affected part of this contract for breach, or at its option, the whole contract. Violation of one of these provisions may also result in debarment from State contracting regardless of whether the specific contract is terminated.
 - f. In accordance with Executive Order 61 (2017), a prohibition on discrimination by the contractor, in its employment practices, subcontracting practices, and delivery of goods or services, on the basis of race, sex, color, national origin, religion, sexual orientation, gender identity, age, political affiliation, disability, or veteran status, is hereby incorporated in this contract.
2. The contractor will include the provisions of 1. above in every subcontract or purchase order over \$10,000, so that the provisions will be binding upon each subcontractor or vendor.

- D. **ETHICS IN PUBLIC CONTRACTING:** By submitting their proposals, offerors certify that their proposals are made without collusion or fraud and that they have not offered or received any kickbacks or inducements from any other offeror, supplier, manufacturer or subcontractor in connection with their (bid/proposal), and that they have not conferred on any public employee having official responsibility for this procurement transaction any payment, loan, subscription, advance, deposit of money, services or anything of more than nominal value, present or promised, unless consideration of substantially equal or greater value was exchanged.

- E. **IMMIGRATION REFORM AND CONTROL ACT OF 1986:** Applicable for all contracts over \$10,000:

By entering into a written contract with the Commonwealth of Virginia, the Contractor certifies that the Contractor does not, and shall not during the performance of the contract for goods and services in the Commonwealth, knowingly employ an unauthorized alien as defined in the federal Immigration Reform and Control Act of 1986.

- F. **DEBARMENT STATUS:** By participating in this procurement, the vendor certifies that they are not currently debarred by the Commonwealth of Virginia from submitting a response for the type of goods and/or services covered by this solicitation. Vendor further certifies that they are not debarred from filling any order or accepting any resulting order, or that they are an agent of any person or entity that is currently debarred by the Commonwealth of Virginia.

If a vendor is created or used for the purpose of circumventing a debarment decision against another vendor, the non-debarred vendor will be debarred for the same time period as the debarred vendor.

- G. **ANTITRUST:** By entering into a contract, the contractor conveys, sells, assigns, and transfers to the Commonwealth of Virginia all rights, title and interest in and to all causes of action it may now have or hereafter acquire under the antitrust laws of the United States and the Commonwealth of Virginia, relating to the particular goods or services purchased or acquired by the Commonwealth of Virginia under said contract.

- H. **MANDATORY USE OF STATE FORM AND TERMS AND CONDITIONS FOR RFPs:**

Failure to submit a proposal on the official state form provided for that purpose may be a cause for rejection of the proposal. Modification of or additions to the General Terms and Conditions of the solicitation may be cause for rejection of the proposal; however, the Commonwealth reserves the right to decide, on a case by case basis, in its sole discretion, whether to reject such a proposal.

- I. **CLARIFICATION OF TERMS:** If any prospective offeror has questions about the specifications or other solicitation documents, the prospective offeror should contact the buyer whose name appears on the face of the solicitation no later than five working days before the due date. Any revisions to the solicitation will be made only by addendum issued by the buyer.

- J. **PAYMENT:**

1. **To Prime Contractor:**

- a. Invoices for items ordered, delivered and accepted shall be submitted by the contractor directly to the payment address shown on the purchase order/contract. All invoices shall show the state contract number and/or purchase order number; social security number (for individual contractors) or the federal employer identification number (for proprietorships, partnerships, and corporations).
- b. Any payment terms requiring payment in less than 30 days will be regarded as requiring payment 30 days after invoice or delivery, whichever occurs last. This shall not affect offers of discounts for payment in less than 30 days, however.
- c. All goods or services provided under this contract or purchase order, that are to be paid for with public funds, shall be billed by the contractor at the contract price, regardless of which public agency is being billed.
- d. The following shall be deemed to be the date of payment: the date of postmark in all cases where payment is made by mail, or when offset proceedings have been instituted as authorized under the Virginia Debt Collection Act.
- e. **Unreasonable Charges.** Under certain emergency procurements and for most time and material purchases, final job costs cannot be accurately determined at the time orders are placed. In such cases, contractors should be put on notice that final payment in full is contingent on a determination of reasonableness with respect to all invoiced charges. Charges which appear to be unreasonable will be resolved in accordance with *Code of Virginia*, § 2.2-4363 and -4364. Upon determining that invoiced charges are not reasonable, the Commonwealth shall notify the contractor of defects or improprieties in invoices within fifteen (15) days as required in *Code of Virginia*, § 2.2-4351. The provisions of this section do not relieve an agency of its prompt payment obligations with respect to those charges which are not in dispute (*Code of Virginia*, § 2.2-4363).

2. **To Subcontractors:**

- a. Within seven (7) days of the contractor's receipt of payment from the Commonwealth, a contractor awarded a contract under this solicitation is hereby obligated:

- (1) To pay the subcontractor(s) for the proportionate share of the payment received for work performed by the subcontractor(s) under the contract; or
 - (2) To notify the agency and the subcontractor(s), in writing, of the contractor's intention to withhold payment and the reason.
 - b. The contractor is obligated to pay the subcontractor(s) interest at the rate of one percent per month (unless otherwise provided under the terms of the contract) on all amounts owed by the contractor that remain unpaid seven (7) days following receipt of payment from the Commonwealth, except for amounts withheld as stated in (2) above. The date of mailing of any payment by U. S. Mail is deemed to be payment to the addressee. These provisions apply to each sub-tier contractor performing under the primary contract. A contractor's obligation to pay an interest charge to a subcontractor may not be construed to be an obligation of the Commonwealth.
 3. Each prime contractor who wins an award in which provision of a SWaM procurement plan is a condition to the award, shall deliver to the contracting agency or institution, on or before request for final payment, evidence and certification of compliance (subject only to insubstantial shortfalls and to shortfalls arising from subcontractor default) with the SWaM procurement plan. Final payment under the contract in question may be withheld until such certification is delivered and, if necessary, confirmed by the agency or institution, or other appropriate penalties may be assessed in lieu of withholding such payment.
 4. The Commonwealth of Virginia encourages contractors and subcontractors to accept electronic and credit card payments.
- K. **PRECEDENCE OF TERMS:** The following General Terms and Conditions *VENDORS MANUAL*, APPLICABLE LAWS AND COURTS, ANTI-DISCRIMINATION, ETHICS IN PUBLIC CONTRACTING, IMMIGRATION REFORM AND CONTROL ACT OF 1986, DEBARMENT STATUS, ANTITRUST, MANDATORY USE OF STATE FORM AND TERMS AND CONDITIONS, CLARIFICATION OF TERMS, PAYMENT shall apply in all instances. In the event there is a conflict between any of the other General Terms and Conditions and any Special Terms and Conditions in this solicitation, the Special Terms and Conditions shall apply.
- L. **QUALIFICATIONS OF OFFERORS:** The Commonwealth may make such reasonable investigations as deemed proper and necessary to determine the ability of the offeror to perform the services/furnish the goods and the offeror shall furnish to the Commonwealth all such information and data for this purpose as may be requested. The Commonwealth reserves the right to inspect offeror's physical facilities prior to award to satisfy questions regarding the offeror's capabilities. The Commonwealth further reserves the right to reject any proposal if the evidence submitted by, or investigations of, such offeror fails to satisfy the Commonwealth that such offeror is properly qualified to carry out the obligations of the contract and to provide the services and/or furnish the goods contemplated therein.
- M. **TESTING AND INSPECTION:** The Commonwealth reserves the right to conduct any test/inspection it may deem advisable to assure goods and services conform to the specifications.
- N. **ASSIGNMENT OF CONTRACT:** A contract shall not be assignable by the contractor in whole or in part without the written consent of the Commonwealth.
- O. **CHANGES TO THE CONTRACT:** Changes can be made to the contract in any of the following ways:
1. The parties may agree in writing to modify the terms, conditions, or scope of the contract. Any additional goods or services to be provided shall be of a sort that is ancillary to the contract goods or services, or within the same broad product or service categories as were included in the contract award. Any increase or decrease in the price of the contract resulting from such modification shall be agreed to by the parties as a part of their written agreement to modify the scope of the contract.
 2. The Purchasing Agency may order changes within the general scope of the contract at any time by written notice to the contractor. Changes within the scope of the contract include, but are not limited to, things such as services to be performed, the method of packing or shipment, and the place of delivery or installation. The contractor shall comply with the notice upon receipt, unless the contractor intends to claim an adjustment to compensation, schedule, or other contractual impact that would be caused by complying with such notice, in which case the contractor shall, in writing, promptly notify the Purchasing Agency of the adjustment to be sought, and before proceeding to comply with the notice, shall await the Purchasing Agency's written decision affirming, modifying, or revoking the prior

written notice. If the Purchasing Agency decides to issue a notice that requires an adjustment to compensation, the contractor shall be compensated for any additional costs incurred as the result of such order and shall give the Purchasing Agency a credit for any savings. Said compensation shall be determined by one of the following methods:

- a. By mutual agreement between the parties in writing; or
 - b. By agreeing upon a unit price or using a unit price set forth in the contract, if the work to be done can be expressed in units, and the contractor accounts for the number of units of work performed, subject to the Purchasing Agency's right to audit the contractor's records and/or to determine the correct number of units independently; or
 - c. By ordering the contractor to proceed with the work and keep a record of all costs incurred and savings realized. A markup for overhead and profit may be allowed if provided by the contract. The same markup shall be used for determining a decrease in price as the result of savings realized. The contractor shall present the Purchasing Agency with all vouchers and records of expenses incurred and savings realized. The Purchasing Agency shall have the right to audit the records of the contractor as it deems necessary to determine costs or savings. Any claim for an adjustment in price under this provision must be asserted by written notice to the Purchasing Agency within thirty (30) days from the date of receipt of the written order from the Purchasing Agency. If the parties fail to agree on an amount of adjustment, the question of an increase or decrease in the contract price or time for performance shall be resolved in accordance with the procedures for resolving disputes provided by the Disputes Clause of this contract or, if there is none, in accordance with the disputes provisions of the Commonwealth of Virginia *Vendors Manual*. Neither the existence of a claim nor a dispute resolution process, litigation or any other provision of this contract shall excuse the contractor from promptly complying with the changes ordered by the Purchasing Agency or with the performance of the contract generally.
- P. **DEFAULT:** In case of failure to deliver goods or services in accordance with the contract terms and conditions, the Commonwealth, after due oral or written notice, may procure them from other sources and hold the contractor responsible for any resulting additional purchase and administrative costs. This remedy shall be in addition to any other remedies which the Commonwealth may have.
- Q. **TAXES:** Sales to the Commonwealth of Virginia are normally exempt from State sales tax. State sales and use tax certificates of exemption, Form ST-12, will be issued upon request. Deliveries against this contract shall usually be free of Federal excise and transportation taxes. The Commonwealth's excise tax exemption registration number is 54-73-0076K.
- If sales or deliveries against the contract are not exempt, the contractor shall be responsible for the payment of such taxes unless the tax law specifically imposes the tax upon the buying entity and prohibits the contractor from offering a tax-included price.
- R. **USE OF BRAND NAMES:** Unless otherwise provided in this solicitation, the name of a certain brand, make or manufacturer does not restrict offerors to the specific brand, make or manufacturer named, but conveys the general style, type, character, and quality of the article desired. Any article which the public body, in its sole discretion, determines to be the equivalent of that specified, considering quality, workmanship, economy of operation, and suitability for the purpose intended, shall be accepted. The offeror is responsible to clearly and specifically identify the product being offered and to provide sufficient descriptive literature, catalog cuts and technical detail to enable the Commonwealth to determine if the product offered meets the requirements of the solicitation. This is required even if offering the exact brand, make or manufacturer specified. Normally in competitive sealed bidding only the information furnished with the bid will be considered in the evaluation. Failure to furnish adequate data for evaluation purposes may result in declaring a bid nonresponsive. Unless the offeror clearly indicates in its (bid/proposal) that the product offered is an equivalent product, such proposal will be considered to offer the brand name product referenced in the solicitation.
- S. **TRANSPORTATION AND PACKAGING:** By submitting their proposals, all offerors certify and warrant that the price offered for FOB destination includes only the actual freight rate costs at the lowest and best rate and is based upon the actual weight of the goods to be shipped. Except as otherwise specified herein, standard commercial packaging, packing and shipping containers shall be used. All shipping containers shall be legibly marked or labeled on the outside with purchase order number, commodity description, and quantity.
- T. **INSURANCE:** By signing and submitting a bid or proposal under this solicitation, the bidder or offeror certifies that if awarded the contract, it will have the following insurance coverage at the time the contract is awarded. For construction

contracts, if any subcontractors are involved, the subcontractor will have workers' compensation insurance in accordance with §§ 2.2-4332 and 65.2-800 et seq. of the *Code of Virginia*. The bidder or offeror further certifies that the contractor and any subcontractors will maintain these insurance coverages during the entire term of the contract and that all coverage will be provided by companies authorized to sell insurance in Virginia by the Virginia State Corporation Commission.

MINIMUM INSURANCE COVERAGES AND LIMITS:

1. Workers' Compensation - Statutory requirements and benefits. Coverage is compulsory for employers of three or more employees, to include the employer. Contractors who fail to notify the Commonwealth of increases in the number of employees that change their workers' compensation requirements under the *Code of Virginia* during the course of the contract shall be in noncompliance with the contract.
2. Employer's Liability - \$100,000.
3. Commercial General Liability - \$1,000,000 per occurrence and \$2,000,000 in the aggregate. Commercial General Liability is to include bodily injury and property damage, personal injury and advertising injury, products and completed operations coverage. The Commonwealth of Virginia shall be added as an additional insured to the policy by an endorsement.
4. Automobile Liability - \$1,000,000 combined single limit. (Required only if a motor vehicle not owned by the Commonwealth is to be used in the contract. Contractor must assure that the required coverage is maintained by the Contractor (or third party owner of such motor vehicle.)

U. **ANNOUNCEMENT OF AWARD:** Upon the award or the announcement of the decision to award a contract as a result of this solicitation, the purchasing agency will publicly post such notice in eVA (www.eva.virginia.gov) for a minimum of 10 days.

V. **DRUG-FREE WORKPLACE:** Applicable for all contracts over \$10,000:

During the performance of this contract, the contractor agrees to (i) provide a drug-free workplace for the contractor's employees; (ii) post in conspicuous places, available to employees and applicants for employment, a statement notifying employees that the unlawful manufacture, sale, distribution, dispensation, possession, or use of a controlled substance or marijuana is prohibited in the contractor's workplace and specifying the actions that will be taken against employees for violations of such prohibition; (iii) state in all solicitations or advertisements for employees placed by or on behalf of the contractor that the contractor maintains a drug-free workplace; and (iv) include the provisions of the foregoing clauses in every subcontract or purchase order of over \$10,000, so that the provisions will be binding upon each subcontractor or vendor.

For the purposes of this section, "drug-free workplace" means a site for the performance of work done in connection with a specific contract awarded to a contractor, the employees of whom are prohibited from engaging in the unlawful manufacture, sale, distribution, dispensation, possession or use of any controlled substance or marijuana during the performance of the contract.

W. **NONDISCRIMINATION OF CONTRACTORS:** A bidder, offeror, or contractor shall not be discriminated against in the solicitation or award of this contract because of race, religion, color, sex, sexual orientation, gender identity, national origin, age, disability, faith-based organizational status, any other basis prohibited by state law relating to discrimination in employment or because the bidder or offeror employs ex-offenders unless the state agency, department or institution has made a written determination that employing ex-offenders on the specific contract is not in its best interest. If the award of this contract is made to a faith-based organization and an individual, who applies for or receives goods, services, or disbursements provided pursuant to this contract objects to the religious character of the faith-based organization from which the individual receives or would receive the goods, services, or disbursements, the public body shall offer the individual, within a reasonable period of time after the date of his objection, access to equivalent goods, services, or disbursements from an alternative provider.

X. **eVA BUSINESS-TO-GOVERNMENT VENDOR REGISTRATION, CONTRACTS, AND ORDERS:** The eVA Internet electronic procurement solution, web site portal www.eVA.virginia.gov, streamlines and automates government purchasing activities in the Commonwealth. The eVA portal is the gateway for vendors to conduct business with state agencies and public bodies. All vendors desiring to provide goods and/or services to the Commonwealth shall participate in the eVA Internet e-procurement solution by completing the free eVA Vendor Registration. All bidders or offerors

must register in eVA and pay the Vendor Transaction Fees specified below; failure to register will result in the bid/proposal being rejected.

Vendor transaction fees are determined by the date the original purchase order is issued and the current fees are as follows:

- a. For orders issued July 1, 2014, and after, the Vendor Transaction Fee is:
 - (i) DSBSD-certified Small Businesses: 1%, capped at \$500 per order.
 - (ii) Businesses that are not DSBSD-certified Small Businesses: 1%, capped at \$1,500 per order.
- b. Refer to Special Term and Condition “eVA Orders and Contracts” to identify the number of purchase orders that will be issued as a result of this solicitation/contract with the eVA transaction fee specified above assessed for each order.

For orders issued prior to July 1, 2014, the vendor transaction fees can be found at www.eVA.virginia.gov.

The specified vendor transaction fee will be invoiced, by the Commonwealth of Virginia Department of General Services, typically within 60 days of the order issue date. Any adjustments (increases/decreases) will be handled through purchase order changes.

- Y. **AVAILABILITY OF FUNDS:** It is understood and agreed between the parties herein that the agency shall be bound hereunder only to the extent that the legislature has appropriated funds that are legally available or may hereafter become legally available for the purpose of this agreement.
- Z. **BID PRICE CURRENCY:** Unless stated otherwise in the solicitation, offerors shall state offer prices in US dollars.
- AA. **AUTHORIZATION TO CONDUCT BUSINESS IN THE COMMONWEALTH:** A contractor organized as a stock or nonstock corporation, limited liability company, business trust, or limited partnership or registered as a registered limited liability partnership shall be authorized to transact business in the Commonwealth as a domestic or foreign business entity if so required by Title 13.1 or Title 50 of the *Code of Virginia* or as otherwise required by law. Any business entity described above that enters into a contract with a public body pursuant to the *Virginia Public Procurement Act* shall not allow its existence to lapse or its certificate of authority or registration to transact business in the Commonwealth, if so required under Title 13.1 or Title 50, to be revoked or cancelled at any time during the term of the contract. A public body may void any contract with a business entity if the business entity fails to remain in compliance with the provisions of this section.
- BB. **CIVILITY IN STATE WORKPLACES:** The contractor shall take all reasonable steps to ensure that no individual, while performing work on behalf of the contractor or any subcontractor in connection with this agreement (each, a “Contract Worker”), shall engage in 1) harassment (including sexual harassment), bullying, cyber-bullying, or threatening or violent conduct, or 2) discriminatory behavior on the basis of race, sex, color, national origin, religious belief, sexual orientation, gender identity or expression, age, political affiliation, veteran status, or disability.

The contractor shall provide each Contract Worker with a copy of this Section and will require Contract Workers to participate in agency training on civility in the State workplace if contractor’s (and any subcontractor’s) regular mandatory training programs do not already encompass equivalent or greater expectations. Upon request, the contractor shall provide documentation that each Contract Worker has received such training.

For purposes of this Section, “State workplace” includes any location, permanent or temporary, where a Commonwealth employee performs any work-related duty or is representing his or her agency, as well as surrounding perimeters, parking lots, outside meeting locations, and means of travel to and from these locations. Communications are deemed to occur in a State workplace if the Contract Worker reasonably should know that the phone number, email, or other method of communication is associated with a State workplace or is associated with a person who is a State employee.

The Commonwealth of Virginia may require, at its sole discretion, the removal and replacement of any Contract Worker who the Commonwealth reasonably believes to have violated this Section.

This Section creates obligations solely on the part of the contractor. Employees or other third parties may benefit incidentally from this Section and from training materials or other communications distributed on this topic, but the Parties to this agreement intend this Section to be enforceable solely by the Commonwealth and not by employees or other third parties.

IX. SPECIAL TERMS AND CONDITIONS

- A. **AUDIT:** The contractor shall retain all books, records, and other documents relative to this contract for five (5) years after final payment, or until audited by the Commonwealth of Virginia, whichever is sooner. The agency, its authorized agents, and/or state auditors shall have full access to and the right to examine any of said materials during said period.
- B. **AWARD:** Selection shall be made of two or more offerors deemed to be fully qualified and best suited among those submitting proposals on the basis of the evaluation factors included in the Request for Proposals, including price, if so stated in the Request for Proposals. Negotiations shall be conducted with the offerors so selected. Price shall be considered, but need not be the sole determining factor. After negotiations have been conducted with each offeror so selected, the agency shall select the offeror which, in its opinion, has made the best proposal, and shall award the contract to that offeror. The Commonwealth may cancel this Request for Proposals or reject proposals at any time prior to an award, and is not required to furnish a statement of the reasons why a particular proposal was not deemed to be the most advantageous (*Code of Virginia*, § 2.2-4359D). Should the Commonwealth determine in writing and in its sole discretion that only one offeror is fully qualified, or that one offeror is clearly more highly qualified than the others under consideration, a contract may be negotiated and awarded to that offeror. The award document will be a contract incorporating by reference all the requirements, terms and conditions of the solicitation and the contractor's proposal as negotiated.
- C. **ADDITIONAL USERS:** This procurement is being conducted on behalf of state agencies, institutions and other public bodies who may be added or deleted at any time during the period of the contract. The addition or deletion of authorized users not specifically named in the solicitation shall be made only by written contract modification issued by this agency or institution and upon mutual agreement of the contractor. Such modification shall name the specific agency added or deleted and the effective date. The contractor shall not honor an order citing the resulting contract unless the ordering entity has been added by written contract modification.
- D. **CANCELLATION OF CONTRACT:** The purchasing agency reserves the right to cancel and terminate any resulting contract, in part or in whole, without penalty, upon 60 days written notice to the contractor. In the event the initial contract period is for more than 12 months, the resulting contract may also be terminated by the contractor, without penalty, after the initial 12 months of the contract period upon 60 days written notice to the other party. Any contract cancellation notice shall not relieve the contractor of the obligation to deliver and/or perform on all outstanding orders issued prior to the effective date of cancellation.
- E. **RENEWAL OF CONTRACT:** This contract may be renewed by the Commonwealth upon written agreement of both parties for two successive one year periods, under the terms of the current contract, and at a reasonable time (approximately 90 days) prior to the expiration.
- F. **EXTRA CHARGES NOT ALLOWED:** The bid price shall be for complete installation ready for the Commonwealth's use, and shall include all applicable freight and installation charges; extra charges will not be allowed.
- G. **eVA ORDERS AND CONTRACTS:** The solicitation/contract will result in multiple purchase order(s) with the applicable eVA transaction fee assessed for each order.

Vendors desiring to provide goods and/or services to the Commonwealth shall participate in the eVA Internet e-procurement solution and agree to comply with the following: If this solicitation is for a term contract, failure to provide an electronic catalog (price list) or index page catalog for items awarded will be just cause for the Commonwealth to reject your bid/offer or terminate this contract for default. The format of this electronic catalog shall conform to the eVA Catalog Interchange Format (CIF) Specification that can be accessed and downloaded from www.eVA.virginia.gov. Contractors should email Catalog or Index Page information to eVA-catalog-manager@dgs.virginia.gov.

- H. **PROPOSAL ACCEPTANCE PERIOD:** Any proposal in response to this solicitation shall be valid for 120 days. At the end of the days the proposal may be withdrawn at the written request of the offeror. If the proposal is not withdrawn at that time it remains in effect until an award is made or the solicitation is canceled.
- I. **SPECIAL EDUCATIONAL OR PROMOTIONAL DISCOUNTS:** The contractor shall extend any special educational or promotional sale prices or discounts immediately to the Commonwealth during the term of the contract. Such notice shall also advise the duration of the specific sale or discount price.
- J. **CONFIDENTIALITY OF PERSONALLY IDENTIFIABLE INFORMATION:** The contractor assures that information and data obtained as to personal facts and circumstances related to patients or clients will be collected and

held confidential, during and following the term of this agreement, and unless disclosure is required pursuant to court order, subpoena or other regulatory authority, will not be divulged without the individual's and the agency's written consent and only in accordance with federal law or the Code of Virginia. Contractors who utilize, access, or store personally identifiable information as part of the performance of a contract are required to safeguard this information and immediately notify the agency of any breach or suspected breach in the security of such information. Contractors shall allow the agency to both participate in the investigation of incidents and exercise control over decisions regarding external reporting. Contractors and their employees working on this project may be required to sign a confidentiality statement.

K. **CONTINUITY OF SERVICES:**

- a) The Contractor recognizes that the services under this contract are vital to the Agency and must be continued without interruption and that, upon contract expiration, a successor, either the Agency or another contractor, may continue them. The Contractor agrees:
 - (i) To exercise its best efforts and cooperation to effect an orderly and efficient transition to a successor;
 - (ii) To make all Agency owned facilities, equipment, and data available to any successor at an appropriate time prior to the expiration of the contract to facilitate transition to successor; and
 - (iii) That the Agency Contracting Officer shall have final authority to resolve disputes related to the transition of the contract from the Contractor to its successor.
- b) The Contractor shall, upon written notice from the Contract Officer, furnish phase-in/phase-out services for up to ninety (90) days after this contract expires and shall negotiate in good faith a plan with the successor to execute the phase-in/phase-out services. This plan shall be subject to the Contract Officer's approval.
- c) The Contractor shall be reimbursed for all reasonable, pre-approved phase-in/phase-out costs (i.e., costs incurred within the agreed period after contract expiration that result from phase-in, phase-out operations) and a fee (profit) not to exceed a pro rata portion of the fee (profit) under this contract. All phase-in/phase-out work fees must be approved by the Contract Officer in writing prior to commencement of said work.

L. **STATE CORPORATION COMMISSION IDENTIFICATION NUMBER:** Pursuant to Code of Virginia, §2.2-4311.2 subsection B, a bidder or offeror organized or authorized to transact business in the Commonwealth pursuant to Title 13.1 or Title 50 is required to include in its bid or proposal the identification number issued to it by the State Corporation Commission (SCC). Any bidder or offeror that is not required to be authorized to transact business in the Commonwealth as a foreign business entity under Title 13.1 or Title 50 or as otherwise required by law is required to include in its bid or proposal a statement describing why the bidder or offeror is not required to be so authorized. Indicate the above information on the SCC Form provided. Contractor agrees that the process by which compliance with Titles 13.1 and 50 is checked during the solicitation stage (including without limitation the SCC Form provided) is streamlined and not definitive, and the Commonwealth's use and acceptance of such form, or its acceptance of Contractor's statement describing why the bidder or offeror was not legally required to be authorized to transact business in the Commonwealth, shall not be conclusive of the issue and shall not be relied upon by the Contractor as demonstrating compliance.

M. **E-VERIFY PROGRAM:** EFFECTIVE 12/1/13. Pursuant to *Code of Virginia*, §2.2-4308.2., any employer with more than an average of 50 employees for the previous 12 months entering into a contract in excess of \$50,000 with any agency of the Commonwealth to perform work or provide services pursuant to such contract shall register and participate in the E-Verify program to verify information and work authorization of its newly hired employees performing work pursuant to such public contract. Any such employer who fails to comply with these provisions shall be debarred from contracting with any agency of the Commonwealth for a period up to one year. Such debarment shall cease upon the employer's registration and participation in the E-Verify program. If requested, the employer shall present a copy of their Maintain Company page from E-Verify to prove that they are enrolled in E-Verify.

N. **SUBCONTRACTS:** No portion of the work shall be subcontracted without prior written consent of the purchasing agency. In the event that the contractor desires to subcontract some part of the work specified herein, the contractor shall furnish the purchasing agency the names, qualifications and experience of their proposed subcontractors. The contractor shall, however, remain fully liable and responsible for the work to be done by its subcontractor(s) and shall assure compliance with all requirements of the contract.

O. **SUBMISSION OF SMALL BUSINESS SUBCONTRACTING PLAN, EVIDENCE OF COMPLIANCE WITH SMALL BUSINESS SUBCONTRACTING PLAN, AND SUBCONTRACTOR REPORTING :**

- A. Submission of Small Business Subcontracting Plan: It is the statewide goal of the Commonwealth that 42% of its purchases be made from small businesses certified by DSBSD. This includes discretionary spending in prime contracts and subcontracts. All offerors are required to submit a Small Business Subcontracting Plan. The

contractor is encouraged to offer such subcontracting opportunities to DSBSD-certified small businesses. This shall include DSBSD-certified women-owned and minority-owned businesses and businesses with DSBSD service disabled veteran-owned status when they have also received DSBSD small business certification. Where it is not practicable for any portion of the goods/services to be subcontracted to other suppliers, the offeror shall note such on the Small Business Subcontracting Plan. No offeror or subcontractor shall be considered a small business unless certified as such by the Department of Small Business and Supplier Diversity (DSBSD) by the due date for receipt of bids or proposals.

- B. Evidence of Compliance with Small Business Subcontracting Plan: Each prime contractor who wins an award in which provision of a small business subcontracting plan is a condition of the award, shall deliver to the contracting agency or institution annual reports substantiating compliance in accordance with the small business subcontracting plan. If a variance exists, the contractor shall provide a written explanation. A subcontractor shall be considered a Small Business for purposes of a contract if and only if the subcontractor holds a certification as such by the DSBSD. Payment(s) may be withheld until the purchasing agency confirms that the contractor has certified compliance with the contractor's submitted Small Business Subcontracting Plan or is in receipt of a written explanation of the variance. The agency or institution reserves the right to pursue other appropriate remedies for non-compliance to include, but not be limited to, termination for default.
- C. Prime Contractor Subcontractor Reporting:
 - 1. Each prime contractor who wins an award greater than \$100,000, shall deliver to the contracting agency or institution on annual basis, all applicable information for each subcontractor listed on the Small Business Subcontracting Plan that are DSBSD-certified businesses or Employment Services Organizations (ESOs). The contractor shall furnish the applicable information to the purchasing office via the Subcontractor Payment Reporting tool accessible within the contractor's eVA account.
 - 2. In addition each prime contractor who wins an award greater than \$200,000 shall deliver to the contracting agency or institution on annual basis, all applicable information on use of subcontractors that are **not** DSBSD-certified businesses or Employment Services Organizations. The contractor shall furnish the all applicable information to the purchasing office via the Subcontractor Payment Reporting tool accessible within the contractor's eVA account.
- P. **PRIME CONTRACTOR RESPONSIBILITIES:** The contractor shall be responsible for completely supervising and directing the work under this contract and all subcontractors that he may utilize, using his best skill and attention. Subcontractors who perform work under this contract shall be responsible to the prime contractor. The contractor agrees that he is as fully responsible for the acts and omissions of his subcontractors and of persons employed by them as he is for the acts and omissions of his own employees.
- Q. **CONFIDENTIALITY (Contractor):** The contractor assures that information and data obtained as to personal facts and circumstances related to patients or clients will be collected and held confidential, during and following the term of this agreement, and will not be divulged without the individual's and the agency's written consent. Any information to be disclosed, except to the agency and its designees, must be in summary, statistical, or other form which does not identify particular individuals. Contractors and their employees working on this project will be required to sign the Confidentiality statement in this solicitation.
- R. **ENERGY-EFFICIENT AND WATER-EFFICIENT GOODS:** When an agency or institution receives two or more bids for products that are Energy Star certified, meet the Federal Energy Management Program (FEMP) designated efficiency requirements, appear on FEMP's Low Standby Power Product List; or are WaterSense certified, the agency or institution shall only select among those bids.

X. ATTACHMENTS:

- A. Offeror Data Sheet
- A. Service Requirements Deemed Important in Consideration of Contractor Selection
- B. Offeror Discount Pricing List
- C. MALiA Member Listing
- D. Small Business Subcontracting Plan
- E. Virginia State Corporation Commission (SCC) Registration information
- F. Proprietary/Confidential Information Identification

ATTACHMENT A

OFFEROR DATA SHEET - **MUST BE FILLED OUT**

Note: The following information is required as part of your response to this solicitation. Failure to complete and provide this sheet may result in finding your bid nonresponsive. (In the case of a two-step IFB, it may cause the proposal portion to be determined to be not acceptable.)

1. Qualification: The vendor must have the capability and capacity in all respects to satisfy fully all of the contractual requirements.
2. Vendor's Primary Contact:
Name: Lee Ann Queen Phone: cell = 704-219-4952
3. Years in Business: Indicate the length of time you have been in business providing this type of good or service:
193 Years Months
4. Vendor Information: eVA Vendor ID or DUNS Number: eVA Vendor VS0000217656

Indicate below a listing of at least four (4) current or recent accounts, either commercial or governmental, that your company is serving, has serviced, or has provided similar good. Include the length of service and the name, address and telephone number of the point of contact.

- A. Company: Nassau Library System Contact: Robert Drake, Assistant Director, Technology Operations
Email: RDrake@nassaulibrary.org (900 Jerusalem Ave. / Uniondale, NY 11553) 516-292-8920, ext 241
Project: Ongoing Customer
Dates of Service: Customer since 1986 \$ Value: *
- B. Company: Ocean State Libraries Contact: Steve Spohn, Executive Director
Email: SSpohn@oslri.net (300 Centerville Rd / Summit South, Ste 103 / Warwick, RI 02886) 401-738-2200, ext. 101
Project: Ongoing Customer
Dates of Service: ** \$ Value: *
- C. Company: Boston Public Library Contact: Melissa Andrews, Collection Development Manager
Email: MAndrews@bpl.org (700 Boylston St. / Boston, MA 02116) 617-859-2145
Project: Ongoing Customer
Dates of Service: Customer since 1982 \$ Value: *
- D. Company: Charlotte Mecklenburg Public Library Contact: Caitlin Moen, Chief Library Services Officer
Email: cmoen@cmlibrary.org (310 N. Tryon St. / Charlotte, NC 28202) (704) 416-0626
Project: Ongoing Customer
Dates of Service: Customer since 1985 \$ Value: *

I certify the accuracy of this information.

Signed: Lee Ann Queen Title: Director-Pricing Services

Date: March 1, 2022

** While customer sales volume is considered proprietary, each entity or Library group has annual sales exceeding \$1 million dollars.*

*** This is a Library group, we have worked with some individual member customers since 1980.*

ATTACHMENT B

Service Requirements Deemed Important in Consideration of Contractor Selection

Offerors shall return a completed copy of this attachment with their proposals, fully addressing each requirement/question. Additional documents may be attached only if necessary.

I. COMPANY DATA

1. Describe the vendor's related work experiences that would demonstrate ability to fulfill the contract. Include the extent to which the vendor is actively engaged in supplying materials to libraries of the type listed in this RFP.

We are a leading supplier to thousands of customers worldwide, consisting of domestic and international academic and public libraries, special libraries, and government agencies, with annual sales of more than 52 million product units. Baker & Taylor offers experience and expertise in the distribution of books, e-books, spoken word audio CD, DVD, and Music CD products and related technical and physical processing services, offering a variety of options such as standard, firm orders, continuation services, and customized library services. We serve as a vital link in the publishing industry; Baker & Taylor's expertise in the provision of services and materials is built upon its relationships with more than 75,000 publishers/producers and imprints, supporting an inventory of 11 million units.

We have worked with members of the MALIA Cooperative for over 29 years, and we presently serve as an awarded vendor of the current agreement.

2. What is the vendor's total staff size and where are they located?

Baker & Taylor employs over 1,100 people in national and international locations. Our headquarter office is located in Charlotte, NC, with regional services centers in Commerce, GA and Momence, IL, and collection development and publisher services administration in Bridgewater, NJ.

3. What is the approximate number of libraries the vendor serves in each of the following categories?

Public 6,100 Academic 52 School Not Special 48
Applicable

4. Describe the vendor's financial stability, available equipment, and other resources that will ensure the delivery of acceptable services to MALIA.

Baker & Taylor is one of the world's largest distributors of books, eBooks, audiovisual materials, and related services. We maintain a workforce of over 1,100 employees, with locations across the US. Baker & Taylor will save MALIA members time and money by providing a single source for a wide range of ordering choices. We offer a wide array of value-added services to our Library customers, including flexible cataloging, processing, and collection development services.

Baker & Taylor is proud of its longstanding affiliation with MALIA, having serviced the members for more than 29 years. We offer local sales representation, with separate representatives for each customer group (public libraries/state agencies, and academic libraries/ special libraries).

General Company Information

Baker & Taylor is headquartered in Charlotte, North Carolina and operates distribution, technical support, and sales centers worldwide. Our Charlotte location maintains all sales administration, customized library services, human resources and financial operations.

For a banking reference, MALIA may contact:

Bank of America, N.A.

Atlanta Plaza Building

600 Peachtree Street, NE

Atlanta, GA 30308-2265

Linda Thrash

Telephone: (404) 607-5388

Fax: (404) 607-5482

DUNS Number: 78-772-4772

5. What categories of materials will the vendor supply? (check all that apply):

☒ Books: Print
☒ Books: Electronic
☒ Books: Audio (on CD)
☒ Music (on CD)
☒ Video (DVD or Blu-ray)

6. If vendor will be supplying **Print Books**:

- a. Approximate number of print book publishers/distributors the vendor can supply:

A force in the book and media communities, Baker & Taylor has established relationships with over 75,000 publishers and producers, 25,000 from which we order materials on a regular basis. Baker & Taylor is continually expanding the number of publishers and producers from which we purchase materials. We add, on average, 200 new publisher/producers a month, including major trade, university press, independent press, foreign language press, specialty publishers, and high demand, non-print producers. Our aggressive pursuit of the materials libraries need is best emphasized by our "open list" approach to new publishers and to publishers for which we have noticed an increase in demand.

- b. Approximate number of print book titles the vendor currently supplies:

Our Title Source website contains information on over 10 million print titles. Our inventory contains over 580,000 titles, with another 3 million available for order.

- c. Types of print books the vendor can supply (check all that apply):

☒ Fiction

- ☒ Nonfiction
- ☒ Current/Popular
- ☒ Reference
- ☒ Large Print
- ☒ Non-English Language
- ☒ Graphic Novels
- ☒ Other: Please see Exhibits 1 and 2 for a description of material categories

d. Types of audience the vendor can supply (check all that apply):

- ☒ Children
- ☒ Young Adult
- ☒ Adult

e. Provide evidence that demonstrates that the vendor maintains sufficient inventory to supply up to 5 copies of most titles without backordering.

Baker & Taylor's national inventory is over 11 million book volumes. Our Buying team works with publishers to assure that highly anticipated titles are received at Baker & Taylor well in advance of street date. Additionally, stock levels for publishers representing any popular, high-demand, and/or classic title are monitored closely. Stock is replenished on a regular basis, thus eliminating lengthy backorder timeframes.

f. Describe print book acquisition options the vendor offers (e.g. firm order, standing order/continuations, demand-driven, approval plans, leasing, etc.).

Ordering

Baker & Taylor offers a variety of ordering methods for books, audiovisual materials and standing order services. Orders may be placed by phone, fax, electronically, or by mail or e-mail.

Please see Exhibit 5 for details.

Specialty purchase and Lease programs are available to assist customers with selection. Brief descriptions are provided below; please see Exhibit 7 for additional details.

Continuation Services (Traditional Reference Profiled Series)

Our Continuation Services database includes 40,000+ Series representing in excess of 250,000 individual titles. These include numbered and unnumbered monographic series, proceedings, non-subscription serials, sets in progress, selected U.S. government documents, and publications of the United Nations and other international agencies, as distributed in the U.S. Some of our best-selling series include: World Almanac and Book of Facts, Writer's Market, Rand McNally Road Atlas, Physician's Desk Reference, Scott Standard Postage Catalogue, Fodor's Travel Series, Peterson's Guides and Who's Who Directories.

*Unlike other vendors in the industry, B&T **does not** limit your selection of series and titles to a closed listing. B&T offers a wide variety of publishers and has an extensive offering in text, technical and reference series collections. If you are interested in receiving a series which is not in our database, we will contact the appropriate Publisher to determine its availability and will establish it for you.*

Automatically Yours (Popular Author/Series Profiles)

Baker & Taylor's Automatically Yours program delivers the latest publications from popular authors right to your door.

Select your favorite authors, and Baker & Taylor will send the latest titles, as soon as they are released.

Firm Order discounts will apply.

Automatically Yours has 8 different programs to choose from:

Popular Adult Fiction Authors – featuring over 1000 fiction authors

CATS Authors & Illustrators – featuring over 600 of the most popular children and young adult authors, both fiction and non-fiction.

CATS Awards – featuring more than 80 professionally selected national and international children's and teens awards

Spoken Word Audio

Large Print Popular Adult Fiction Authors

Book Club Plans - Baker & Taylor offers 4 different Book Club Plans to help meet your patrons' needs:

"Today" Show Book Club

Reading with Ripa Book Club

"Good Morning America" Book Club

"Oprah's" Book Club

(although Oprah has discontinued her book club, she will occasionally recommend titles. We will continue to automatically ship these titles)

Inspirational Authors – Offers over 250 authors to choose

Graphic Novels - Available for Adult and Teen titles. Choose from 500 series.

CATS Series (Children's and Teens) (popular series automatic shipment)

This service provides the newest and most popular continuing series for public libraries, including picture books, easy-to-read, juvenile fiction and nonfiction, graphic novels/Manga/comic strip books, teen fiction and nonfiction, and Spanish/bilingual titles. New titles are shipped to you automatically upon publication when you request the series appropriate for your children's and teen collections.

Additionally, we provide confirmation reports on forthcoming titles including information such as ISBN, publisher, and order status.

Parade Programs (subscription service)

Parade Program titles are popular monthly genre title selections (selected by our B&T staff) suitable for library patrons. We have several different plans from which to choose:

-Adult Paperback Parade

-CATS Paperback Parade

-Music and DVD Parade

Book Leasing (subscription service)

Baker & Taylor's Book Leasing program is a great way to temporarily increase your library's number of popular books with the ability to return them when patron demand has subsided.

When you begin using our Book Leasing service, your library will build its own collection by retaining books ordered through the Monthly New Book Quota until your collection reaches its proper size. Each month, a pre-publication title list will be sent to you so that you may choose the titles you'd like to receive. All of your requested books will arrive shelf-ready, with all cataloging and processing completed to your specifications.

Available plans include

Popular Adult Print

Children's & Teens Print

Spirit – Religious and Inspirational Print

Large Print Adult – Trade Editions

Computer Books

Each library has unique needs in terms of plan size, processing and material cataloging. For this reason, plans are priced specifically based on the program parameters defined by each library. Baker & Taylor would be delighted to provide specific plan pricing after a review of requirements with any interested MALIA members. Our comprehensive programs are designed to meet the needs of libraries of all sizes. Book

Leasing plans are a part of the collection management strategy for libraries all around the globe. The demand for these plans is increasing as libraries seek to manage their high volume content areas with an aggressive holds filling strategy. Let us design a plan for your library!

- g. Describe any other print book value-added/enhanced services the vendor will offer.

Cataloging/Processing Services

techXpress Services

Baker & Taylor offers a comprehensive range of processing/cataloging services for the shelf-ready preparation of book, spoken word audio CD, DVD, Blu-ray, and music CD product through techXpress. This service provides cataloging and processing solutions and service levels designed to accommodate every need. Our techXpress services will provide MARC and printed spine label for any title with an existing record in our cataloging database.

Pricing for these services is provided in RFP Attachment C. Please see Exhibit 8 for details on techXpress programs.

Customized Library Services

Baker & Taylor also can provide fully shelf-ready processing/cataloging services adapted to the library's local practices through our Customized Library Services (CLS) division. Please see Exhibit 9 for a description of the services and project-management approach available through B&T's CLS group. Prices for these services are developed upon review of Library requirements; please contact our offices for assistance.

Collection Development Services

Baker & Taylor collection management librarians have extensive experience working in library collection development and/or technical services before their employment with Baker & Taylor. Our management team has created this organization carefully, recruiting librarians with a wide range of complementary, specialized subject knowledge, representing different sized institutions and a range of geographic regions.

Our Title Source 360 site provides access to a variety of current release and pre-publication title lists. Please see below for additional information.

Popular title and topic lists, created by our Collection Development staff, are available for your access, in cart form. These lists are part of our Selection List Services.

OnLine Selection Lists (Free of Charge)

Baker & Taylor's on-line selection lists are developed by our professional staff to help save you time and effort in searching for titles of interest. Utilizing Title Source, you can browse our comprehensive list of Title Lists, developed exclusively for you.

Lists are organized into useful categories of similar lists, helping you easily browse the topics that interest you and your patrons.

- *Academia*
- *Adult Fiction and Non-Fiction*
- *Children's Fiction and Non-Fiction*
- *Spanish Language Fiction and Non-Fiction*
- *Spoken Word Audio*
- *Music and Video*
- *Computer Titles*
- *Scientific, Technical, and Medical*
- *University Press*
- *UK Adult Titles*
- *Audio & Video New Releases*
- *Book Leasing (prepublication list of new releases)*

- *Booking Ahead*
- *Children's & Teen (CATS)*
- *Critic's Choice (award winners)*
- *Critic's Picks (book clubs, reviews)*
- *Fast Facts*
- *Spanish & Hispanic Titles*

To access the lists, simply log-in from Title Source via *Quick Links*.

Catalog Listings (free of charge; available on-line and in Title Source cart format)

These catalogs are available electronically via our website www.baker-taylor.com. From the top horizontal bar, select "Libraries"; then "Public Libraries". From the left side bar, select "Publications".

Forecast –Adult new release

CATS Series – Children's and Teens Series new release

La Vida Espanol – Spanish language new release

Graphic Novels – Graphic Novel new release

Growing Minds – Children's and Teens new release

Scope – Science, technical, medical, and academic bestsellers

Spirit – Religious, inspirational, and motivational titles

First Look "Plus" Selection Lists (free of charge)

Plus Notification lists provide an "off-the-shelf" array of general subject and genre selection lists. Lists are based on popular selection criteria, such as appearance in key critical review media or appearance in popular B&T publications such as *Forecast* and *Growing Minds*. The service includes an Express category which delivers the newest key titles to selectors based on criteria such as print run, author inclusion in our *Automatically Yours* program, LJ Pre-Pub Alert citation, and appearance in B&T's weekly "Fast Facts" list. The objective of Express lists is to provide a simple, consistent method of moving these titles into selectors' hands as early as possible.

First Look Custom Selection Lists (pricing available upon request)

Baker & Taylor offers a wide array of customized selection services under the **First Look** family of Notification services. First Look is a profile driven selection list service for print as well as audio-visual material. Profiles may be based on any number of selection criteria, including subject keywords, author profiles, award-citation, Dewey Call Number and/or call number ranges, review publications, starred review citations, and many other criteria. Lists can be prepared and delivered on a scheduled basis (monthly, bi-monthly, or even weekly), based on customer requirements. First Look notification lists can be delivered directly to specific Title Source users and can be duplicate-managed by B&T to exclude titles that have appeared on previous lists and/or titles that have been previously ordered by the Library.

Baker & Taylor's Collection Management group has one of the most extensive databases in the industry to support collection projects and ongoing selection. Our core selection application can access over 10 million book, e-book, audio book, Music CD and DVD titles. Data can be accessed and output by using an extensive range of access points including but not limited to:

- Dewey Classification
- Library of Congress Classification
- Library of Congress Subject Headings
- Fiction Genres

- *Juvenile Material Type, i.e. Picture Book, Easy Readers*
- *Subject Thesauri such as BISAC Subject Classifications*
- *Non-book Material Genres*
- *Key Word that can be applied to subject access points, full text annotations, and/or tables of contents*

In addition to these subject/content descriptions, data can be accessed and output by non-subject descriptive data elements including but not limited to:

- *Review Citation*
- *Citation in Industry Standard Bibliographies such as Public Library Catalog or Best Books for Children*
- *Series*
- *Level of Readership/Intended Audience*
- *Physical Format/Material Type*
- *Availability Status*
- *Stock Status*
- *Date of Publication/Copyright*
- *Price*

Baker & Taylor's Collection Management librarians also maintain bibliographies that can be used to support library collection development projects. Examples include interdisciplinary multicultural collections, featuring world content.

B&T provides collection development data in cart format via Title Source 360. Data availability includes, but is not limited to the following:

- *ISBN/ISSN*
- *Binding/Format*
- *List Price*
- *Delivered Price*
- *Holdings (see below)*
- *Class Number (s)*
- *Author/Editor*
- *Title*
- *Edition Statement*
- *Publisher*
- *Date of Publication/Copyright*
- *Series*
- *Brief Annotation*
- *Interest Level*
- *Indication of Status*
- *Subject Classification*

In addition, B&T can provide almost any data element that is included in the structure of a MARC record in our selection lists. We can include data that indicates:

- *Juvenile Material Type, i.e. Picture Book, Easy Readers*
- *Subject Thesauri Elements such as BISAC Subject Classifications*
- *Non-book Material Genres*
- *Review Citation indications*
- *Citation in Industry Standard Bibliographies such as Public Library Catalog or Best Books for Children*
- *Physical Format/Material Type*
- *Availability Status*
- *Stock Status*
- *Demand statistics accumulated from all B&T customers*

Review Sources

B&T can provide access to full-text review citations from the following major review sources.

<i>AudioFile</i>	<i>1992--</i>
<i>Booklist</i>	<i>Jan. 1995--</i>
<i>BookPage</i>	<i>Inception 1999--</i>
<i>Choice</i>	<i>1998--</i>
<i>Doody's</i>	<i>1993--</i>
<i>E-Streams</i>	<i>Inception (not known)</i>
<i>ForeWord</i>	<i>Inception 1999--</i>
<i>Clarion Reviews</i>	<i>Nov. 2001--</i>
<i>Horn Book Guide</i>	<i>1994--</i>
<i>Horn Book Magazine</i>	<i>1996--</i>
<i>Kirkus</i>	<i>1991--</i>
<i>Voice of Youth Advocates</i>	<i>1997--</i>
<i>PW Annex</i>	<i>12/23/2003</i>
<i>LJ</i>	<i>all available reviews (~1985--)</i>
<i>SLJ</i>	<i>all available reviews (~1985--)</i>
<i>Criticas</i>	<i>Inception 2001--</i>
<i>Library Talk</i>	<i>9/98 -- 2/01</i>
<i>Book Report</i>	<i>1/94 -- 2/01</i>
<i>Technology Connection</i>	<i>10/94 -- 10/98</i>
<i>Library Media Connection</i>	<i>Jan 2004--</i>
<i>VideoLibrarian</i>	<i>Jan. 2002</i>
<i>CD Hotlist</i>	<i>1999--</i>

Children's and Teen Services Department

This is a specialized department within Baker & Taylor, composed of experts in youth literature, collection development services and solutions. As the sole wholesaler with such expertise, over 65% of public libraries utilize Baker & Taylor's Children's and Teen Services.

The Children's and Teen Services department is committed to supporting readers advisory, collection development, and the overall professional growth of Children's and Teen librarians. Our CATS Regional Sales Coordinators are field consultants and spend their days in public libraries across the U.S. Your dedicated CATS team member is available to meet with library staff to discuss collection development assistance, workflow solutions, best practices, and Title Source 360 (TS360) tips and training. The CATS team also regularly facilitates events where selectors, youth services librarians, and other patron-facing library staff come together and take advantage of shared knowledge and experience.

Specialty services include:

TitleTalk

This notification service provides an overview of key titles being published up to six months prepublication. The CATS team creates, hosts, and facilitates a variety of events under the TitleTalk umbrella. These events are meant to bring librarians together in a professional, fun, and informative setting to discuss topics specific to their daily responsibilities, patron needs, processes and workflows, and general overall objectives.

TitleTalk: Previews

These full day events are hosted in public libraries across the US. A wide range of publishers are on hand to provide forthcoming title information for key children's and teen materials. New title information presented via PowerPoint typically includes jacket images, print run totals, and internal spreads. Each attendee receives full title information via handouts and also has the opportunity to interact with and ask questions of our presenters. Select advance reader copies are provided along with numerous publisher promotional kits appropriate for programming. Corresponding bibliographies and PowerPoints are posted on TS360 to support titles previewed, as well. Materials covered typically include books up to six months from publication date. Special guest author and complimentary book signing concludes the event.

TitleTalk: Trends

The CATS team conducts focused seasonal and regional presentations throughout the US presenting overall publishing trends and forthcoming title previews. The time-frame and format can be customized to fit the specific interests and needs of the Library, staff in-service day, regional event, etc. As with our full day events, select advance reader copies are provided along with numerous publisher promotional kits appropriate for programming. Corresponding bibliographies and PowerPoints are posted on TS360 to support titles previewed. Your dedicated CATS Coordinator can also provide TitleTalk: Trends presentations via webinars to smaller groups or individual librarians.

Webinars – The CATS team hosts webinars on a variety of focused topics such as forthcoming titles, public library best practices, program planning and trends, publisher trends, debut authors and much more.

CATS Booking Ahead - Booking Ahead is one of Baker & Taylor's monthly prepublication notification services. CATS provides four separate monthly selection lists ranging from preK through teen levels, up to three months in advance of publication date. These Selection Lists are housed in TS360™.

CATS Meow – Monthly e-newsletter providing new title reviews, Top Ten lists of best-selling titles, new and ceased series information, industry news highlights, publisher related contests, PawPrint prebound promotions, national and state library conference calendar and much more.

CATS Microsite – Focused website containing all Baker & Taylor products and services related specifically to the needs of children's and teen librarians. Also includes hyperlinks directly into new and popular selection lists within TS360™.

CATS Prebind Manager – Our dedicated CATS prebind managers are available to assist your staff with special title requests, timely order fulfillment, and general questions about our PawPrint prebound product. New title selection lists are created and maintained in dedicated PawPrint areas within TS360™. Collaborating with our publisher partners allows for prebind selection lists offering promotional discounts for new and backlist titles. These promotions are communicated to our customers through a variety of methods and corresponding selection lists are posted for your review within TS360™.

7. If vendor will be supplying **Electronic Books**:

a. Approximate number of e-book publishers/distributors the vendor can supply:

Axis 360 offers access to more than 3 million eBook titles, including digital coverage of over 540 eBook publishers (2400 imprints). Baker & Taylor provides full content coverage for all the major trade publishers and works with specialty publishers, international and academic publishers and a wide range of aggregators of indie author publishing. In addition to full coverage of Adult fiction and nonfiction material, Axis 360 offers extraordinary coverage of Children's and Teen materials. Non-English materials are also available on Axis 360 in both eBook and digital audiobook formats.

b. Approximate number of e-book titles the vendor currently supplies:

Axis 360 offers access to more than 3 million eBook titles

c. Types of e-books you can supply (check all that apply):

- ☒ Fiction
- ☒ Nonfiction
- ☒ Current/Popular
- ☒ Reference
- ☒ Non-English Language
- ☒ Graphic Novels
- ☒ University Press
- Other: _____

d. Types of audience the vendor can supply (check all that apply):

- ☒ Children
- ☒ Young Adult
- ☒ Adult

e. What e-book file formats can the vendor supply? (check all that apply):

- ☒ EPUB
- ☒ PDF
- Other: _____

A majority of content available for Axis 360 is provided by publishers in EPUB3 format. Some publishers have yet to upgrade from EPUB2 to EPUB3, but EPUB2 content is supported as well. Only a few specialty publishers provide content exclusively in PDF.

- f. Do vendor e-books require specific software or e-readers?

 X Yes (Axis 360 app or in-browser streaming)
 No

If Yes, describe:

Axis 360 is a robust platform serving the needs of many of the largest libraries and consortia in the U.S. The Axis 360 website and apps provide users with the streamlined functionality they need to easily discover and enjoy digital content instantaneously in three steps or less. Content is delivered to a full range of popular devices and computers used for eBook reading and listening to audiobooks. Alternatively, Axis 360 content is also available to enjoy streaming to modern web browsers such as Google Chrome or Mozilla Firefox for users that prefer not to use an app.

Users may access Axis 360 content online via Read Now and Listen Now in-browser streaming on all mobile devices, Macintosh, and Windows PCs. Users can also access the content via download to the Axis 360 app for iOS, Android and Kindle Fire devices.

The Axis 360 mobile app runs on any current iOS (v. 7+) or Android (v. 4.4.2+) platform, including Kindle Fire. Adobe Digital Editions is also supported for users of laptops, computers and eInk devices that require download and synching to portable reading devices.

The Axis 360 app is available for direct installation to devices from the Apple App Store, Google Play and the Kindle App Store. (Installation of the Axis app on Kindle Fire is direct and does not require "side-loading" or the deactivation of third-party software protections.)

Streaming delivery for eBooks (Read Now) and eAudio (Listen Now) is available via all modern browsers, and so serves all mobile devices and portable and desktop computers, including Chromebooks. eBooks that are accessed via our browser-based delivery also can be downloaded to browser cache for full offline access throughout the loan period.

- g. Do vendor e-books have accessibility features that enable them to be read as audio, Braille, or large print by library patrons with sight disabilities?

 X Yes (see below)
 No

If Yes, describe:

Axis 360 meets ADA accessibility standards in the following manner:

Axis 360 with the Axis 360 Desktop app provides an accessible solution for browsing, borrowing, and reading digital books. Axis 360 websites are designed to function with the following major screen readers: JAWS, Window-Eyes, and NVDA (non-visual desktop access).

All eBooks can be read with the use of a screen reader. The Axis 360 Desktop app also includes synchronized text highlighting and text-to-speech reading on all books whenever we detect the presence of at least one of the above screen readers on the user's system and not just when text-to-speech has been authorized by the publisher/author. Therefore, while text-to-speech may not be available in all books for users who do not use screen readers, text-to-speech is available on all books for users who do use screen readers.

The Axis 360 apps for iOS and Android provide an accessible reading and listening experience for screen reader users regardless of the device being used. Both Android and iOS include a screen reader as part of the operating system. Axis 360

has been designed to allow for full navigation of eBooks and audio books using Talkback on Android and VoiceOver on iOS. Due to some idiosyncrasies with the way that text is handled in the reading view for eBooks, the reading experience will not be exactly the same between Android and iOS, e.g displaying font sizes.

As part of our efforts to develop a more universal digital reading platform, Axis 360 also includes a web browser-based reader and audio player. Both the eBook and audio book portion of the reader have been designed to be accessible with all of the popular browsers and screen readers. Accessibility testing has been performed with the following screen readers and browser combinations.

-VoiceOver with Safari on Mac OS X and above

-VoiceOver with Safari on iOS

-JAWS and NVDA with Internet Explorer 11 on Windows 8.1 and above

-JAWS and NVDA with Firefox on Windows 8.1 and above

- h. Describe any license, download, print, or other e-book usage/access restrictions that apply. Specify the limit on the number of users that can access an e-book at the same time, if applicable, and the authentication methods available to restrict access to library patrons.

Publishers determine the licensing and access models for their content on aggregator platforms. Most publishers currently offer libraries perpetual licensing to their titles. A few major publishers license titles for a limited time or a specified number of circulations. In Title Source 360, it is easy for library staff to see the licensing model available for a given title as well as pricing for the title. Library staff also can filter search results by licensing model.

Currently available License Purchase models for eBooks:

- single-use, perpetual access*
- single-user, two-year metered*
- single-user, two-year or 52-circs metered*
- single-user, one-year metered*
- single-user ARPA prorated*
- single-user 26-circulation metered*
- multi-user, perpetual*
- multi-user, one-year metered*

Currently available License Purchase models for eAudio:

- single-use, perpetual access*
- single-user, one-year metered*
- single-user, two-year metered*
- single-user, three-year metered*
- single-user, four-year metered*
- multi-user, pay-per-circulation*

Authentication

Axis 360 offers a range of options to accommodate library authentication needs. Authentication methods for communications with ILS patron databases include SIP2, NCIP, EZProxy, LDAP, Polaris API, Innovative Interfaces Patron API, and other proprietary protocols. Axis 360 also has single-sign-on integration with a number of third-party service providers such as discovery-layer and mobile app vendors.

- i. Are copies of vendor e-books maintained on a dark archive that can be accessed if the hosting platform ceases to exist?

____ Yes
X No

If No, describe how a library will access its purchased e-books if the platform ceases.

B&T fully supports the Library's right to transfer content, with publisher permissions. We will provide inventory reports including details of metered access (time or circulations remaining) and will coordinate with the new hosting vendor.

- j. Describe e-book acquisition options the vendor offers (e.g. firm order, standing order/continuations, demand-driven, approval plans, leasing, etc.):

Baker & Taylor offers a wide array of collection development services that provide libraries with options for digital collection development and management. Our staff of degreed librarians offers acquisitions guidance, posting regularly updated selection lists and producing customized lists on demand. Libraries can opt to receive new-publication notification carts in a variety of subject areas, genres and formats. B&T also provides automated delivery of popular authors and series in fiction and nonfiction, as well as popular adult and children's and teens series.

FirstLook Digital notifies libraries every month about new and forthcoming digital titles. This service helps save time during the title selection process, allowing the library to easily update its digital collection with high-demand content.

Libraries also can set up Automatically Yours standing order plans for digital content, ensuring the library's collection always has the most popular titles on the day they publish. This program provides automatic delivery of newly published popular authors/series works, as profiled for the Library.

In Popular Adult Fiction, libraries can choose from more than 150 authors in popular genres such as Romance, Thriller, Horror and Historical Fiction. In Adult Nonfiction, choose from more than 200 Travel, Education, Reference, Study Aid, Test Prep and other series. In Children's and Teens choose from more than 150 series, and in Digital Spoken Word choose from more than 100 popular authors.

The library also will receive Quick Axis weekly email alerts about publisher promotions, key new releases, and trending titles receiving a lot of media attention for the week. Baker & Taylor maintains and regularly updates over 500 Awards and Honors lists, 17 Bestseller lists, 100 Children's and Teen's lists and 31 General Adult lists, as well as over a dozen genre specific publications posted as selection lists in Title Source 360 (our web-based selection and ordering tool).

- k. Describe any other e-book value-added/enhanced services the vendor will offer:
MARC
B&T provides the library with MARC records for each digital title purchased for Axis 360.

Standard B&T MARC records are provided at no charge. Most Axis 360 customers use these free standard records for their OPACs to power content discovery and checkouts.

If the Library would like B&T to upgrade the records to meet local cataloging practices, fees may be charged, depending on the complexities of the library's requirements. These fees will be between \$1.00 - \$2.00 per record, based on the level of complexity of the required customization.

Pop Up Library (available for a separate fee)

Baker and Taylor's Pop-Up Library is a small electronic device (the size of a hotspot) that hosts eBooks from the public library and creates its own WiFi network similar to those you use in a hotel or airport. Axis 360 titles purchased will be available on the Pop Up Library devices and to library patrons via standard access options.

PressReader Newspapers & Magazines (available for a separate fee)

- Access to the entire collection of international newspapers and magazines provided by PressReader – the global leader in day-and-date online delivery of the world's leading periodicals.*
- Unlimited, multi-user access available to all issues on the day of publication.*
- 3000 newspapers and 4000 magazines from 160 countries available in their original languages.*
- Users can search by keyword across all publications, save search profiles and set up personal content subscriptions to selected titles*
- Instant Translation - With the press of a button, translate content into 18 languages.*
- User access via Axis 360, or via the award-winning PressReader mobile app.*

Public Library – K12 School Community Resource Sharing (free of charge)

B&T actively encourages public libraries to engage in sharing children's and teen's electronic resources to school settings as it increases engagement with the public library, is a good use of tax dollars, supports literacy efforts and has the potential to create life-long readers and library supporters. To support school sharing programs, Baker & Taylor has developed functionality that allows each school to have its own Axis 360 site branded and scoped to meet its students' needs. We offer these separate sites, all with access to content made available from the public library repository, at no extra charge. The communities working with us in this way have seen a 4-fold increase in circulation of children's and YA eBooks. The program is invisible to public library patrons but can be life-changing for kids in schools who do not have easy access to the kinds of materials public libraries purchase—the reading for entertainment titles that make it fun.

8. If vendor will be supplying **Audiobooks:**

a. Approximate number of audiobook publishers/distributors the vendor can supply:

eAudiobooks

Axis 360 offers access to more than 225,000 eAudiobook titles, which includes digital coverage of over 900 eAudio suppliers. Baker & Taylor works with all of the "Big 5" trade publishers and a wide range of specialty, international, academic and Indie Author suppliers. Selections include Adult, Children's, and Young Adult titles, fiction and nonfiction.

Spoken Word Audio CD

A force in the book and media communities, Baker & Taylor has established relationships with over 75,000 publishers and producers, 25,000 from which we order materials on a regular basis. We maintain relationships with the print and spoken word audio divisions of each publisher partner.

b. Approximate number of audiobook titles the vendor currently supplies:

Axis 360 offers access to more than 225,000 eAudiobook titles.

Our inventory contains over 12,700 Spoken Word Audio CD titles, with an additional 260,000 available to order.

c. Types of audiobooks the vendor can supply (check all that apply):

- ☒ CD
- ☒ Downloadable audio
- ☐ Streaming audio
- ☒ Fiction
- ☒ Nonfiction
- ☒ Current/Popular
- ☒ Non-English Language
- ☐ Other: _____

d. Types of audience the vendor can supply (check all that apply):

- ☒ Children
- ☒ Young Adult
- ☒ Adult

e. What audiobook file formats can the vendor supply? (check all that apply):

- ☒ MP3
- ☒ Other: Compact Disc and downloadable eAudiobook via Axis 360

- f. Do vendor audiobooks require specific software or listening devices?

 X Yes (see below)

 No

If Yes, describe:

Axis 360 is a robust platform serving the needs of many of the largest libraries and consortia in the U.S. The Axis 360 website and apps provide users with the streamlined functionality they need to easily discover and enjoy digital content instantaneously in three steps or less. Content is delivered to a full range of popular devices and computers used for eBook reading and listening to audiobooks. Alternatively, Axis 360 content is also available to enjoy streaming to modern web browsers such as Google Chrome or Mozilla Firefox for users that prefer not to use an app.

Users may access Axis 360 content online via Read Now and Listen Now in-browser streaming on all mobile devices, Macintosh, and Windows PCs. Users can also access the content via download to the Axis 360 app for iOS, Android and Kindle Fire devices.

The Axis 360 mobile app runs on any current iOS (v. 7+) or Android (v. 4.4.2+) platform, including Kindle Fire. Adobe Digital Editions is also supported for users of laptops, computers and eInk devices that require download and synching to portable reading devices.

The Axis 360 app is available for direct installation to devices from the Apple App Store, Google Play and the Kindle App Store. (Installation of the Axis app on Kindle Fire is direct and does not require “side-loading” or the deactivation of third-party software protections.)

Streaming delivery for eBooks (Read Now) and eAudio (Listen Now) is available via all modern browsers, and so serves all mobile devices and portable and desktop computers, including Chromebooks. eBooks that are accessed via our browser-based delivery also can be downloaded to browser cache for full offline access throughout the loan period.

- g. Describe any license, download, or other digital audiobook usage/access restrictions that apply. Specify the limit on the number of users that can access a digital/streaming audiobook at the same time, if applicable, and the authentication methods available to restrict access to library patrons.

Publishers determine the licensing and access models for their content on aggregator platforms. Most publishers currently offer libraries perpetual licensing to their titles. A few major publishers license titles for a limited time or a specified number of circulations. In Title Source 360, it is easy for library staff to see the licensing model available for a given title as well as pricing for the title. Library staff also can filter search results by licensing model.

Currently available License Purchase models for eBooks:

- single-use, perpetual access*
- single-user, two-year metered*
- single-user, two-year or 52-circs metered*
- single-user, one-year metered*
- single-user ARPA prorated*
- single-user 26-circulation metered*
- multi-user, perpetual*
- multi-user, one-year metered*

Currently available License Purchase models for eAudio:

- single-use, perpetual access*
- single-user, one-year metered*
- single-user, two-year metered*
- single-user, three-year metered*
- single-user, four-year metered*
- multi-user, pay-per-circulation*

Authentication

Axis 360 offers a range of options to accommodate library authentication needs. Authentication methods for communications with ILS patron databases include SIP2, NCIP, EZProxy, LDAP, Polaris API, Innovative Interfaces Patron API, and other proprietary protocols. Axis 360 also has single-sign-on integration with a number of third-party service providers such as discovery-layer and mobile app vendors.

- h. Are copies of vendor digital audiobooks maintained on a dark archive that can be accessed if the hosting platform ceases to exist?

☐ Yes
☒ No

If No, describe how a library will access its purchased digital audiobooks if the platform ceases.
B&T fully supports the Library's right to transfer content, with publisher permissions. We will provide inventory reports including details of metered access (time or circulations remaining) and will coordinate with the new hosting vendor.

- i. Describe audiobook acquisition options the vendor offers (e.g. firm order, standing order/continuations, demand-driven, approval plans, leasing, etc.):

eAudiobooks

Baker & Taylor offers a wide array of collection development services that provide libraries with options for digital collection development and management. Our staff of degreed librarians offers acquisitions guidance, posting regularly updated selection lists and producing customized lists on demand. Libraries can opt to receive new-publication notification carts in a variety of subject areas, genres and formats. B&T also provides automated delivery of popular authors and series in fiction and nonfiction, as well as popular adult and children's and teens series.

FirstLook Digital notifies libraries every month about new and forthcoming digital titles. This service helps save time during the title selection process, allowing the library to easily update its digital collection with high-demand content.

Libraries also can set up Automatically Yours standing order plans for digital content, ensuring the library's collection always has the most popular titles on the day they publish. This program provides automatic delivery of newly published popular authors/series works, as profiled for the Library.

In Popular Adult Fiction, libraries can choose from more than 150 authors in popular genres such as Romance, Thriller, Horror and Historical Fiction. In Adult Nonfiction, choose from more than 200 Travel, Education, Reference, Study Aid, Test Prep and other series. In Children's and Teens choose from more than 150 series, and in Digital Spoken Word choose from more than 100 popular authors.

The library also will receive Quick Axis weekly email alerts about publisher promotions, key new releases, and trending titles receiving a lot of media attention for the week. Baker & Taylor maintains and regularly updates over 500 Awards and Honors lists, 17 Bestseller lists, 100 Children's and Teen's lists and 31 General Adult lists, as well as over a dozen genre specific publications posted as selection lists in Title Source 360 (our web-based selection and ordering tool).

Spoken Word Audio CD

Ordering

Baker & Taylor offers a variety of ordering methods for books, audiovisual materials and standing order services. Orders may be placed by phone, fax, electronically, or by mail or e-mail.

Please see Exhibit 5 for details.

Specialty purchase programs are available to assist customers with selection. Brief descriptions are provided below; please see Exhibit 7 for additional details.

Automatically Yours (Popular Author/Series Profiles)

Baker & Taylor's Automatically Yours program delivers the latest publications from popular authors right to your door.

Select your favorite authors, and Baker & Taylor will send the latest spoken word titles, as soon as they are released. Firm Order discounts will apply.

Parade Programs (subscription service)

Parade Program titles are popular monthly genre spoken word audio title selections (selected by our B&T staff) suitable for library patrons

- j. Describe any other audiobook value-added/enhanced services the vendor will offer:

eAudiobook

MARC

B&T provides the library with MARC records for each digital title purchased for Axis 360.

Standard B&T MARC records are provided at no charge. Most Axis 360 customers use these free standard records for their OPACs to power content discovery and checkouts.

If the Library would like B&T to upgrade the records to meet local cataloging practices, fees may be charged, depending on the complexities of the library's requirements. These fees will be between \$1.00 - \$2.00 per record, based on the level of complexity of the required customization.

Pop Up Library (available for a separate fee)

Baker and Taylor's Pop-Up Library is a small electronic device (the size of a hotspot) that hosts eBooks from the public library and creates its own WiFi network similar to those you use in a hotel or airport. Axis 360 titles purchased will be available on the Pop Up Library devices and to library patrons via standard access options.

Public Library – K12 School Community Resource Sharing (free of charge)

B&T actively encourages public libraries to engage in sharing children's and teen's electronic resources to school settings as it increases engagement with the public library, is a good use of tax dollars, supports literacy efforts and has the potential to create life-long readers and library supporters. To support school sharing programs, Baker & Taylor has developed functionality that allows each school to have its own Axis 360 site branded and scoped to meet its students' needs. We offer these separate sites, all with access to content made available from the public library repository, at no extra charge. The communities working with us in this way have seen a 4-fold increase in circulation of children's and YA eBooks. The program is invisible to public library patrons but can be life-changing for kids in schools who do not have easy access to the kinds of materials public libraries purchase—the reading for entertainment titles that make it fun.

Spoken Word Audio CD

Cataloging/Processing Services

techXpress Services

Baker & Taylor offers a comprehensive range of processing/cataloging services for the shelf-ready

preparation of book, spoken word audio CD, DVD, Blu-ray, and music CD product through techXpress. This service provides cataloging and processing solutions and service levels designed to accommodate every need. Our techXpress services will provide MARC and printed spine label for any title with an existing record in our cataloging database.

Pricing for these services is provided in RFP Attachment C. Please see Exhibit 8 for details on techXpress programs.

Customized Library Services

Baker & Taylor also can provide fully shelf-ready processing/cataloging services adapted to the library's local practices through our Customized Library Services (CLS) division. Please see Exhibit 9 for a description of the services and project-management approach available through B&T's CLS group. Prices for these services are developed upon review of Library requirements; please contact our offices for assistance.

Collection Development Services

Baker & Taylor collection management librarians have extensive experience working in library collection development and/or technical services before their employment with Baker & Taylor. Our management team has created this organization carefully, recruiting librarians with a wide range of complementary, specialized subject knowledge, representing different sized institutions and a range of geographic regions.

Our Title Source 360 site provides access to a variety of current release and pre-publication title lists. Please see below for additional information.

Popular title and topic lists, created by our Collection Development staff, are available for your access, in cart form. These lists are part of our Selection List Services.

OnLine Selection Lists (Free of Charge)

Baker & Taylor's on-line selection lists are developed by our professional staff to help save you time and effort in searching for titles of interest. Utilizing Title Source, you can browse our comprehensive list of Title Lists, developed exclusively for you.

Lists are organized into useful categories of similar lists, helping you easily browse the topics that interest you and your patrons.

- Academia
- Adult Fiction and Non-Fiction, Spoken Word Audio
- Children's Fiction and Non-Fiction, Spoken Word Audio
- Spanish Language Fiction and Non-Fiction

To access the lists, simply log-in from Title Source via [Quick Links](#).

Catalog Listings (free of charge; available on-line and in Title Source cart format)

These catalogs are available electronically via our website www.baker-taylor.com. From the top horizontal bar, select "Libraries"; then "Public Libraries". From the left side bar, select "Publications".

Forecast –Adult new release Hardcover, Paperback, and Spoken Word Audio CD
CATS Series – Children's and Teens Series new release
La Vida Espanol – Spanish language new release
Growing Minds – Children's and Teens new release
Spirit – Religious, inspirational, and motivational titles

First Look “Plus” Selection Lists (free of charge)

Plus Notification lists provide an “off-the-shelf” array of general subject and genre selection lists. Lists are based on popular selection criteria, such as appearance in key critical review media or appearance in popular B&T publications such as Forecast and Growing Minds. The service includes an Express category which delivers the newest key titles to selectors based on criteria such as print run, author inclusion in our Automatically Yours program, LJ Pre-Pub Alert citation, and appearance in B&T’s weekly “Fast Facts” list. The objective of Express lists is to provide a simple, consistent method of moving these titles into selectors’ hands as early as possible.

First Look Custom Selection Lists (pricing available upon request)

*Baker & Taylor offers a wide array of customized selection services under the **First Look** family of Notification services. First Look is a profile driven selection list service for print as well as audio-visual material. Profiles may be based on any number of selection criteria, including subject keywords, author profiles, award-citation, Dewey Call Number and/or call number ranges, review publications, starred review citations, and many other criteria. Lists can be prepared and delivered on a scheduled basis (monthly, bi-monthly, or even weekly), based on customer requirements. First Look notification lists can be delivered directly to specific Title Source users and can be duplicate-managed by B&T to exclude titles that have appeared on previous lists and/or titles that have been previously ordered by the Library.*

Baker & Taylor’s Collection Management group has one of the most extensive databases in the industry to support collection projects and ongoing selection. Our core selection application can access over 10 million book, e-book, audio book, Music CD and DVD titles. Data can be accessed and output by using an extensive range of access points including but not limited to:

- *Dewey Classification*
- *Library of Congress Classification*
- *Library of Congress Subject Headings*
- *Fiction Genres*
- *Juvenile Material Type, i.e. Picture Book, Easy Readers*
- *Subject Thesauri such as BISAC Subject Classifications*
- *Non-book Material Genres*
- *Key Word that can be applied to subject access points, full text annotations, and/or tables of contents*

In addition to these subject/content descriptions, data can be accessed and output by non-subject descriptive data elements including but not limited to:

- *Review Citation*
- *Citation in Industry Standard Bibliographies such as Public Library Catalog or Best Books for Children*
- *Series*
- *Level of Readership/Intended Audience*
- *Physical Format/Material Type*
- *Availability Status*
- *Stock Status*
- *Date of Publication/Copyright*
- *Price*

Baker & Taylor’s Collection Management librarians also maintain bibliographies that can be used to support library collection development projects. Examples include interdisciplinary multicultural collections, featuring world content.

B&T provides collection development data in cart format via Title Source 360. Data availability includes, but is not limited to the following:

- *ISBN/ISSN*
- *Binding/Format*

- *List Price*
- *Delivered Price*
- *Holdings (see below)*
- *Class Number (s)*
- *Author/Editor*
- *Title*
- *Edition Statement*
- *Publisher*
- *Date of Publication/Copyright*
- *Series*
- *Brief Annotation*
- *Interest Level*
- *Indication of Status*
- *Subject Classification*

In addition, B&T can provide almost any data element that is included in the structure of a MARC record in our selection lists. We can include data that indicates:

- *Juvenile Material Type, i.e. Picture Book, Easy Readers*
 - *Subject Thesauri Elements such as BISAC Subject Classifications*
 - *Non-book Material Genres*
 - *Review Citation indications*
 - *Citation in Industry Standard Bibliographies such as Public Library Catalog or Best Books for Children*
 - *Physical Format/Material Type*
 - *Availability Status*
 - *Stock Status*
 - *Demand statistics accumulated from all B&T customers*
-

Review Sources

B&T can provide access to full-text review citations from the following major review sources.

<i>AudioFile</i>	<i>1992--</i>
<i>Booklist</i>	<i>Jan. 1995--</i>
<i>BookPage</i>	<i>Inception 1999--</i>
<i>Choice</i>	<i>1998--</i>
<i>Doody's</i>	<i>1993--</i>
<i>E-Streams</i>	<i>Inception (not known)</i>
<i>ForeWord</i>	<i>Inception 1999--</i>
<i>Clarion Reviews</i>	<i>Nov. 2001--</i>
<i>Horn Book Guide</i>	<i>1994--</i>
<i>Horn Book Magazine</i>	<i>1996--</i>
<i>Kirkus</i>	<i>1991--</i>
<i>Voice of Youth Advocates</i>	<i>1997--</i>
<i>PW Annex</i>	<i>12/23/2003</i>
<i>LJ</i>	<i>all available reviews (~1985--)</i>
<i>SLJ</i>	<i>all available reviews (~1985--)</i>
<i>Criticas</i>	<i>Inception 2001--</i>
<i>Library Talk</i>	<i>9/98 -- 2/01</i>
<i>Book Report</i>	<i>1/94 -- 2/01</i>
<i>Technology Connection</i>	<i>10/94 -- 10/98</i>
<i>Library Media Connection</i>	<i>Jan 2004--</i>
<i>VideoLibrarian</i>	<i>Jan. 2002</i>
<i>CD Hotlist</i>	<i>1999--</i>

9. If vendor will be supplying **Music**:

a. Approximate number of music publishers/distributors the vendor can supply:
Inventories represent over 420 manufacturers. Represented genres include: Latin, Soul, Reggae, Rhythm & Blues, Jazz, Country & Western, Pop, Classical, New Age, Soundtracks, Rap, Hip Hop, Blues, Rock, Alternative, Latin Rock, Blue Grass, Tropical, Norteno, Tejano, Regional Mexican, World Music, Children's Music, Adult Contemporary, Contemporary Christian, Gospel, Folk, Polka, Dance, Holiday, and many more.

b. Approximate number of music titles the vendor currently supplies:
5,500 titles in stock with another 60,000 available for order

c. Types of music materials the vendor can supply (check all that apply):

- ☒ CD
☐ Downloadable music
☐ Streaming music
☐ Print music (e.g. scores, sheet music)
☒ Current/Popular
☒ Classical
☒ International
☐ Other: _____

d. Types of audience the vendor can supply (check all that apply):

- ☒ Children
☒ Young Adult
☒ Adult

e. What digital music file formats can the vendor supply (check all that apply)?

- ☐ MP3
☒ Other: compact disc

f. Does the vendor's digital music require specific software or listening devices?

Not applicable; music CD product is proposed

- ☐ Yes
☐ No

If Yes, describe:

g. Describe any license, download, or other digital music usage/access restrictions that apply. Specify the limit on the number of users that can access a digital/streaming music title at the same time, if applicable, and the authentication methods available to restrict access to library patrons.

Not applicable; music CD product is proposed

- h. Are copies of vendor digital music files maintained on a dark archive that can be accessed if the hosting platform ceases to exist?

Not applicable; music CD product is proposed

_____ Yes

_____ No

If No, describe how a library will access its purchased digital music if the platform ceases.

- i. Describe music acquisition options the vendor offers (e.g. firm order, standing order/continuations, demand-driven, approval plans, leasing, etc.):

In addition to firm orders, we offer the following standing order program

Automatic Shipment

Hot Hits – Standing Order Program

Each week you will receive a list of New Release music titles, based on your profiled Music Genre selections.

This will allow you to make changes to the list before the titles are ordered and shipped to your account.

Benefits of the Hot Hits program include:

- Never receive the same title twice*
- Convenient delivery of lists (Title Source cart or EXCEL spreadsheet)*
- Flexibility to adjust your order quantities at any time*
- Weekly e-mail updates of new titles*
- Choose to receive Parental Advisory or Edited versions of titles*

The program is simple – just tell us how many copies of a title you would like to receive, based upon the following Music genres:

Quantity			
_____	Dance	_____	New Age
_____	Country	_____	Blues
_____	World	_____	Classical
_____	Soundtrack	_____	Pop
_____	Jazz	_____	R & B
_____	Rock	_____	Reggae
_____	Latin	_____	Parental Advisory
_____	Rap	_____	Clean Version Only

Each time a New Release is announced, we will send to you the titles that are in the Genres that you've selected.

- j. Describe any other music value-added/enhanced services the vendor will offer:

Audio Visual Materials

Baker & Taylor is pleased to offer our AV cataloging and processing service for your consideration. This service provides 100% cataloging of new, annotated and advertised DVD, Blu-ray and music CD titles as recommended in selection lists within Title Source. The Baker & Taylor original cataloging record is a pre-publication level MARC record that complies with AACRII or RDA and all national standards.

Please see the enclosed techXpress AV brochure (Exhibit 8) for details.

Catalog Listings (free of charge; available on-line and in Title Source cart format)

Video/Music Audio Lists (Free of Charge)

Press Play Microsite (available via Title Source)

Provides movie and music selections and suggestions. Features include Top 125 CDs, Top 250 Movies, Box Office Hits, and Now In Theaters.

Selection lists by genre are also available in Title Source (BROWSE/SELECTION LISTS/MUSIC & VIDEO). Then select AV First Look to review monthly lists or select separate categories for Award Winners and Honors.

DVD

Search our lists for titles in Action/Adventure, Comedy, Documentary, Drama, Family, Foreign, Sports, Travel, Educational, Horror, Music Video, Mystery, Performing Arts, Science Fiction, Television, Top Sellers, and Westerns.

Music CD

Search our lists for titles in Pop, World Music, Electronica, Latin, Folk, Reggae, New Age, Cast Recordings, Cajun & Zydeco, Classical, Soul, Rap, Hip Hop, Blues, Holiday, Gospel, Christian, Children's, Bluegrass, Jazz, Country & Western, Soundtracks, and more.

Titles on the microsite and the genre selection lists are available in selection list format for ease of order and are issued monthly.

First Look "Plus" Selection Lists (free of charge)

Plus Notification lists provide an "off-the-shelf" array of general subject and genre selection lists. Lists are based on popular selection criteria, such as appearance in key critical review media or appearance in popular B&T publications such as Forecast and Growing Minds. The service includes an Express category which delivers the newest key titles to selectors based on criteria such as print run, author inclusion in our Automatically Yours program, LJ Pre-Pub Alert citation, and appearance in B&T's weekly "Fast Facts" list. The objective of Express lists is to provide a simple, consistent method of moving these titles into selectors' hands as early as possible.

First Look Custom Selection Lists (pricing available upon request)

Baker & Taylor offers a wide array of customized selection services under the First Look family of Notification services. First Look is a profile driven selection list service for print as well as audio-visual material. Profiles may be based on any number of selection criteria, including subject keywords, author profiles, award-citation, Dewey Call Number and/or call number ranges, review publications, starred review citations, and many other criteria. Lists can be prepared and delivered on a scheduled basis (monthly, bi-monthly, or even weekly), based on customer requirements. First Look notification lists can be delivered directly to specific Title Source users and can be duplicate-managed by B&T to exclude titles that have appeared on previous lists and/or titles that have been previously ordered by the Library.

Baker & Taylor's Collection Management group has one of the most extensive databases in the industry to support collection projects and ongoing selection. Our core selection application can access over 10 million book, e-book, audio book, Music CD and DVD titles. Data can be accessed and output by using an extensive range of access points including but not limited to:

- *Dewey Classification*
- *Library of Congress Classification*
- *Library of Congress Subject Headings*
- *Fiction Genres*
- *Juvenile Material Type, i.e. Picture Book, Easy Readers*
- *Subject Thesauri such as BISAC Subject Classifications*
- *Non-book Material Genres*
- *Key Word that can be applied to subject access points, full text annotations, and/or tables of contents*

In addition to these subject/content descriptions, data can be accessed and output by non-subject descriptive data elements including but not limited to:

- *Review Citation*
- *Citation in Industry Standard Bibliographies such as Public Library Catalog or Best Books for Children*
- *Series*
- *Level of Readership/Intended Audience*
- *Physical Format/Material Type*
- *Availability Status*
- *Stock Status*
- *Date of Publication/Copyright*
- *Price*

Baker & Taylor's Collection Management librarians also maintain bibliographies that can be used to support library collection development projects. Examples include interdisciplinary multicultural collections, featuring world content.

B&T provides collection development data in cart format via Title Source 360. Data availability includes, but is not limited to the following:

- *ISBN/ISSN*
- *Binding/Format*
- *List Price*
- *Delivered Price*
- *Holdings (see below)*
- *Class Number (s)*
- *Author/Editor*
- *Title*
- *Edition Statement*
- *Publisher*
- *Date of Publication/Copyright*
- *Series*
- *Brief Annotation*
- *Interest Level*
- *Indication of Status*
- *Subject Classification*

In addition, B&T can provide almost any data element that is included in the structure of a MARC record in our selection lists. We can include data that indicates:

- *Juvenile Material Type, i.e. Picture Book, Easy Readers*
- *Subject Thesauri Elements such as BISAC Subject Classifications*

- *Non-book Material Genres*
 - *Review Citation indications*
 - *Citation in Industry Standard Bibliographies such as Public Library Catalog or Best Books for Children*
 - *Physical Format/Material Type*
 - *Availability Status*
 - *Stock Status*
 - *Demand statistics accumulated from all B&T customers*
-

Review Sources

B&T can provide access to full-text review citations from the following major review sources.

<i>AudioFile</i>	<i>1992--</i>
<i>Booklist</i>	<i>Jan. 1995--</i>
<i>BookPage</i>	<i>Inception 1999--</i>
<i>Choice</i>	<i>1998--</i>
<i>Doody's</i>	<i>1993--</i>
<i>E-Streams</i>	<i>Inception (not known)</i>
<i>ForeWord</i>	<i>Inception 1999--</i>
<i>Clarion Reviews</i>	<i>Nov. 2001--</i>
<i>Horn Book Guide</i>	<i>1994--</i>
<i>Horn Book Magazine</i>	<i>1996--</i>
<i>Kirkus</i>	<i>1991--</i>
<i>Voice of Youth Advocates</i>	<i>1997--</i>
<i>PW Annex</i>	<i>12/23/2003</i>
<i>LJ</i>	<i>all available reviews (~1985--)</i>
<i>SLJ</i>	<i>all available reviews (~1985--)</i>
<i>Criticas</i>	<i>Inception 2001--</i>
<i>Library Talk</i>	<i>9/98 -- 2/01</i>
<i>Book Report</i>	<i>1/94 -- 2/01</i>
<i>Technology Connection</i>	<i>10/94 -- 10/98</i>
<i>Library Media Connection</i>	<i>Jan 2004--</i>
<i>VideoLibrarian</i>	<i>Jan. 2002</i>
<i>CD Hotlist</i>	<i>1999--</i>

10. If vendor will be supplying **Video**:

- a. Approximate number of video publishers/distributors the vendor can supply:

DVD publishers represent over 490 studios. In addition to stocking all of the major studio theatrical hit releases, we also have an extensive inventory of instructional, how-to, juvenile, animated, documentary, movie musical, music video, and Spanish language selections. Children's selections are available for popular movie/TV programming as well as educational pieces suitable for student learning.

- b. Approximate number of video titles the vendor currently supplies:

12,000 titles in stock with another 45,000 available for order

- c. Types of video materials the vendor can supply (check all that apply):

☒ DVD
☒ Blu-ray
☐ Streaming video
☒ Feature/Entertainment
☒ Educational/Instructional
☒ TV Shows
☒ Animated
☒ Foreign
☐ Video Games: Platforms supported: _____
☐ Other: _____

- d. Types of audience the vendor can supply (check all that apply):

☒ Children
☒ Young Adult
☒ Adult

- e. Do your video materials have accessibility features such as captioning for library patrons with disabilities?

☒ Yes
☐ No

If Yes, describe:

If provided by the original manufacturer.

- f. Describe any license, download, or other digital video usage/access restrictions that apply. Specify the limit on the number of users that can access a digital/streaming video title at the same time, if applicable, and the authentication methods available to restrict access to library patrons.

Not applicable; DVD/Blu-ray product is proposed

g. Are copies vendor digital video files maintained on a dark archive that can be accessed if the hosting platform ceases to exist?

Not applicable; DVD/Blu-ray product is proposed

_____ Yes

_____ No

If No, describe how a library will access its purchased digital video if the platform ceases.

h. Describe video acquisition options the vendor offers (e.g. firm order, standing order/continuations, demand-driven, approval plans, leasing, etc.):

Ordering

Baker & Taylor offers a variety of ordering methods for books, audiovisual materials and standing order services. Orders may be placed by phone, fax, electronically, or by mail or e-mail.

Please see Exhibit 5 for details.

Specialty purchase and Lease programs are available to assist customers with selection. Brief descriptions are provided below; please see Exhibit 7 for additional details.

Box Office (DVD-Demand Driven)

With the dramatic rise in DVD demand, we understand the difficulty in keeping up with ordering all of the box office hits. Baker & Taylor can help with our Box Office Hits on DVD Standing Order Program. Simply choose the quantity you would like to receive, based on the millions sold at theatres, and we will ship the product to you. Each week, by email, we will send you the latest list of titles to hit the charts. For more information, please contact us at 800-775-2600 extension 2079.

TV and Movie Standing Order Plans (DVD-Series Driven)

Many libraries are experiencing tremendous growth in their circulation of AV titles; selecting and maintaining an adequate collection of popular DVDs can be a challenge. Our plans allow you to have all of the most popular DVD series titles, shipped automatically as they are produced and released.

DVD Leasing (subscription service)

Baker & Taylor offers a DVD Lease Plan that enables libraries to have the most popular DVD titles available to meet patron demand during peak periods. The DVD Lease Plan is a great way to temporarily increase your library's number of popular DVDs with the ability to return them when patron demand has subsided.

The DVD Lease Plan enables your library to commit funds for DVD purchases at the beginning of the budget cycle while allowing selectors the freedom to choose titles over the duration of the lease period

*Baker & Taylor issues a monthly title list for **DVD Leasing** that includes the most popular DVD titles released during that month for you to use to make your DVD Lease Plan selections.*

Each library has unique needs in terms of plan size, processing and material cataloging. For this reason, plans are priced specifically based on the program parameters defined by each library. Baker & Taylor would be delighted to provide specific plan pricing after a review of requirements with any interested MALIA members. Let us design a plan for your library!

- i. Describe any other video value-added/enhanced services the vendor will offer:

Audio Visual Materials

Baker & Taylor is pleased to offer our AV cataloging and processing service for your consideration. This service provides 100% cataloging of new, annotated and advertised DVD, Blu-ray and music CD titles as recommended in selection lists within Title Source. The Baker & Taylor original cataloging record is a pre-publication level MARC record that complies with AACRII or RDA and all national standards.

Please see the enclosed techXpress AV brochure (Exhibit 8) for details.

Catalog Listings (free of charge; available on-line and in Title Source cart format)

Video/Music Audio Lists (Free of Charge)

Press Play Microsite (available via Title Source)

Provides movie and music selections and suggestions. Features include Top 125 CDs, Top 250 Movies, Box Office Hits, and Now In Theaters.

Selection lists by genre are also available in Title Source (BROWSE/SELECTION LISTS/MUSIC & VIDEO). Then select AV First Look to review monthly lists or select separate categories for Award Winners and Honors.

DVD

Search our lists for titles in Action/Adventure, Comedy, Documentary, Drama, Family, Foreign, Sports, Travel, Educational, Horror, Music Video, Mystery, Performing Arts, Science Fiction, Television, Top Sellers, and Westerns.

Music CD

Search our lists for titles in Pop, World Music, Electronica, Latin, Folk, Reggae, New Age, Cast Recordings, Cajun & Zydeco, Classical, Soul, Rap, Hip Hop, Blues, Holiday, Gospel, Christian, Children's, Bluegrass, Jazz, Country & Western, Soundtracks, and more.

Titles on the microsite and the genre selection lists are available in selection list format for ease of order and are issued monthly.

First Look "Plus" Selection Lists (free of charge)

Plus Notification lists provide an "off-the-shelf" array of general subject and genre selection lists. Lists are based on popular selection criteria, such as appearance in key critical review media or appearance in popular B&T publications such as Forecast and Growing Minds. The service includes an Express category which delivers the newest key titles to selectors based on criteria such as print run, author inclusion in our Automatically Yours program, LJ Pre-Pub Alert citation, and appearance in B&T's weekly "Fast Facts" list. The objective of Express lists is to provide a simple, consistent method of moving these titles into selectors' hands as early as possible.

First Look Custom Selection Lists (pricing available upon request)

*Baker & Taylor offers a wide array of customized selection services under the **First Look** family of Notification services. First Look is a profile driven selection list service for print as well as audio-visual material. Profiles may be based on any number of selection criteria, including subject keywords, author profiles, award-citation, Dewey Call Number and/or call number ranges, review publications, starred review citations, and many other criteria. Lists can be prepared and delivered on a scheduled basis (monthly, bi-monthly, or even weekly), based on customer requirements. First Look notification lists can be delivered directly to specific Title Source users and can be duplicate-managed by B&T to exclude titles that have appeared on previous lists and/or titles that have been previously ordered by the Library.*

Baker & Taylor's Collection Management group has one of the most extensive databases in the industry to support collection projects and ongoing selection. Our core selection application can access over 10 million book, e-book, audio book, Music CD and DVD titles. Data can be accessed and output by using an extensive range of access points including but not limited to:

- *Dewey Classification*
- *Library of Congress Classification*
- *Library of Congress Subject Headings*
- *Fiction Genres*
- *Juvenile Material Type, i.e. Picture Book, Easy Readers*
- *Subject Thesauri such as BISAC Subject Classifications*
- *Non-book Material Genres*
- *Key Word that can be applied to subject access points, full text annotations, and/or tables of contents*

In addition to these subject/content descriptions, data can be accessed and output by non-subject descriptive data elements including but not limited to:

- *Review Citation*
- *Citation in Industry Standard Bibliographies such as Public Library Catalog or Best Books for Children*
- *Series*
- *Level of Readership/Intended Audience*
- *Physical Format/Material Type*
- *Availability Status*
- *Stock Status*
- *Date of Publication/Copyright*
- *Price*

Baker & Taylor's Collection Management librarians also maintain bibliographies that can be used to support library collection development projects. Examples include interdisciplinary multicultural collections, featuring world content.

B&T provides collection development data in cart format via Title Source 360. Data availability includes, but is not limited to the following:

- *ISBN/ISSN*
- *Binding/Format*
- *List Price*
- *Delivered Price*
- *Holdings (see below)*
- *Class Number (s)*
- *Author/Editor*
- *Title*
- *Edition Statement*
- *Publisher*
- *Date of Publication/Copyright*
- *Series*
- *Brief Annotation*
- *Interest Level*
- *Indication of Status*
- *Subject Classification*

In addition, B&T can provide almost any data element that is included in the structure of a MARC record in our selection lists. We can include data that indicates:

- *Juvenile Material Type, i.e. Picture Book, Easy Readers*
- *Subject Thesauri Elements such as BISAC Subject Classifications*
- *Non-book Material Genres*
- *Review Citation indications*
- *Citation in Industry Standard Bibliographies such as Public Library Catalog or Best Books for Children*
- *Physical Format/Material Type*

- *Availability Status*
 - *Stock Status*
 - *Demand statistics accumulated from all B&T customers*
-

Review Sources

B&T can provide access to full-text review citations from the following major review sources.

<i>AudioFile</i>	<i>1992--</i>
<i>Booklist</i>	<i>Jan. 1995--</i>
<i>BookPage</i>	<i>Inception 1999--</i>
<i>Choice</i>	<i>1998--</i>
<i>Doody's</i>	<i>1993--</i>
<i>E-Streams</i>	<i>Inception (not known)</i>
<i>ForeWord</i>	<i>Inception 1999--</i>
<i>Clarion Reviews</i>	<i>Nov. 2001--</i>
<i>Horn Book Guide</i>	<i>1994--</i>
<i>Horn Book Magazine</i>	<i>1996--</i>
<i>Kirkus</i>	<i>1991--</i>
<i>Voice of Youth Advocates</i>	<i>1997--</i>
<i>PW Annex</i>	<i>12/23/2003</i>
<i>LJ</i>	<i>all available reviews (~1985--)</i>
<i>SLJ</i>	<i>all available reviews (~1985--)</i>
<i>Criticas</i>	<i>Inception 2001--</i>
<i>Library Talk</i>	<i>9/98 -- 2/01</i>
<i>Book Report</i>	<i>1/94 -- 2/01</i>
<i>Technology Connection</i>	<i>10/94 -- 10/98</i>
<i>Library Media Connection</i>	<i>Jan 2004--</i>
<i>VideoLibrarian</i>	<i>Jan. 2002</i>
<i>CD Hotlist</i>	<i>1999--</i>

11. What distinguishes the vendor from other vendors of its kind? Specify whether you are a sole-source provider of any material offered.

Baker & Taylor is a full-service vendor, offering print, spoken word audio CD, eBook, eAudio, music CD, and DVD/Blu-ray selections appropriate for library service. In our proposal, we have outlined our capabilities and our proven commitment to service. These qualities, coupled with our 193-year history and our breadth of title and publisher coverage, make Baker & Taylor the best choice to partner with MALIA member libraries.

- We offer:*
 - a team of dedicated account specialists, to monitor both standard orders and specialized projects*
 - area field sales representatives to offer on-site assistance and training as needed*
 - a full-service service center, located in Commerce, GA for fast and efficient delivery*
 - quality title selections geared toward the support of all patron reading and reference needs*
 - a variety of cataloging/processing services to provide quick and efficient delivery to the shelf*
 - electronic selection tools to assist with title searches, collection development, and ordering functions*

- a Collection Development staff with the knowledge and experience to benefit your staff and your patrons

Sole Source

Baker & Taylor is the sole source provider for
 -Title Source family of products
 -PawPrints prebound paperback editions.
 -Axis 360 digital platform

12. Are there other aspects of company data the vendor would like to comment on that have not been covered in this section?

Please see the above section for details.

II. ORDERS AND FULFILLMENT

1. Describe the methods available to member libraries for placing and tracking orders.

Members may place orders via toll-free telephone, toll-free facsimile, email, printed selection lists, printed purchase orders, or electronically online for all categories of materials. "Electronically" includes the library's acquisition system as well as our Title Source 360 database. Please see Exhibit 5 for information on telephone, fax, mail, and email orders. Please see below for information on our Title Source selection and ordering website.

Title Source (Basic Level, Free of Charge)

Baker & Taylor's title database (updated daily) is designed to allow our customers to search for titles and to place basic orders via the Internet. Features include the ability to:

- *Select product by searching our extensive book, spoken word, movie, and music database.*
- *Create and maintain a shopping cart*
- *Send the order to Baker & Taylor via the Internet*
- *Receive order confirmation within minutes of sending the order*
- *Check price and availability of titles before ordering.*

You can register for this service online if you have an active account, in good standing, with Baker & Taylor. If you are a new user, you'll be presented with a user license agreement and a registration form to complete. Ordering from Baker & Taylor via the Internet is just a mouse click away.

Title Source Premium (Subscription Service)

Baker & Taylor's Title Source 360™ is a revolutionary way to order product from one trusted source. Through the latest innovative technology, Title Source 360™ provides users with fast, accurate and personalized search results, and makes ordering easier than ever. Find the products you need and order them quickly and easily with a streamlined checkout process. Baker & Taylor offers order confirmations with the Library's ILS, which provides information on titles confirmed, backordered, or cancelled.

Baker & Taylor's Title Source 360™ is the most extensive database of bibliographic acquisitions information for U.S. publications. This subscription database includes book, ebook, spoken word audio, DVD, and music CD titles. Each record gives current print status (i.e. Not-Yet-Published, Out-of-Print), in-stock availability, and list price. Title information is updated daily and MARC records with tag information can be configured to support your current workflow.

Title Source 360™ Benefits:

- *Largest database of book titles and media products*
- *Fast, customized search results based on prior searches or user profile*
- *Intuitive interface*
- *Inventory view and title searching within cart*
- *Product release calendar*
- *Special offers and promotions*
- *Live customer support*
- *Customized profiles*
- *Streamlined order management*
- *Simple batch entry upload and ordering process*

Title Source 360™ makes it faster and easier to order books, movies or music products. Now you can have millions of products at your fingertips with one easy-to-use ordering system.

Customized Search and Browse Capabilities

Title Source 360™ enhanced search capabilities include type-ahead and spell-checking to aid in your search.

Wealth of data at your fingertips

Each view provides publisher/producer status, inventory level, estimated discounted price, cart and order duplication indication—without a single click of a button.

Enhanced MARC profiler

This feature makes integration with your ILS easy and efficient. Output customized, best available, MARC records with your required ILS data including, but not limited to, notes, location codes, fund codes, and collection codes, to create on-order records. On-order records can be used in the acquisitions process and to enable patrons to place holds on pre-pub titles.

Easy Cart Management

The cart drawer is easily accessible on every page, so you can keep your lists and carts organized. Choose from multiple batch entry options: basic data entry, copy and paste and file import—multiple formats are supported.

Shared Cart Workflow

Share your cart with multiple users and control each step of the process, including selecting who can perform which function and assigning completion deadlines.

Title Source 360™ makes it faster and easier to order books, movies or music products— now you can have millions of products at your fingertips with one easy-to-use ordering system.

The Title Source 360™ database contains detailed, comprehensive, up-to-date information on over 9 million book titles, 265,000 DVD titles, and 780,000 music titles. Data elements also include: 45 key search indices (including LC and Dewey classes), eleven filter criteria (including stock status, publication date, binding, format, and grade level), and duplicate checking between orders and selection carts.

Key Features of Title Source 360™ are:

- Updated daily to insure accurate and current information, including in-stock titles, pre- publication, and new release titles
- Real-time inventory data
- Rich bibliographic information, including over 5.6 million jacket images in full color, first chapters, annotations, tables of contents, as well as standard bibliographic data such as author, ISBN, price, publisher, and publication
- Fully searchable Tables of Contents (1.4 million) and Annotations (5.4 Million). Approximately 1.2 million full-text reviews, including Kirkus, Library Journal, Publishers Weekly, School Library Journal, Horn Book, VOYA, BookPage, Foreword, AudioFile and E- Streams
- Automatically access titles by review publication date
- Over 45 search indices, including BISAC, LC and Dewey classes
- Create, merge, copy, export and transfer selection carts. Carts can even be emailed to other users
- Download MARC records into your ILS system with 9XX tags
- Duplicate checking between orders and selection carts
- Ordering grid capabilities for the library to track multiple branch distribution of title copies as well as three other user-defined fields
- Order grid information may be downloaded to the library's ILS system for ordering and/or transmitted to B&T in the electronic order file sent from Title Source 360™
- Access to Lease Pre-publication lists and Quick Call
- Access to lookup ISBN's in library OPAC with one click
- Administrator determines levels of access for user IDs
- Orders placed electronically will receive an order confirmation within minutes of receipt. Confirmation will detail a status of Confirmed, Backordered, or Cancelled for each line item of the order. As backordered items move through the fulfillment process and are shipped for delivery, the online status maintained in Title Source will update to reflect the activity.

Shared Cart Functionality:

- Simultaneous Access to or Sharing of a single cart by multiple users within single Title Source 360™ account.
- Enhanced Duplicate Checking allows a user to perform a duplicate check for a single title before and/or after placing the title in the cart. Those customers using our Grid Distribution system will see appropriate Grid information displayed in the printable popup window alongside previously provided duplicate information.
- An Inline Grid Distribution Table is incorporated within the Detailed Title Display to give users the ability to enter multiple rows without having to go to a separate grid screen. It is also available as a popup read-only window for shared grid carts.
- A Requisition Table for shared non-grid carts displays the requisition information supplied by all users and is viewable within the Detailed Title Display or from a popup window when using the Multiple Title Display. Information collected and displayed for each user includes: quantity, notes, and any Grid entries.
- Administrators and Cart Owners can find and replace Grid entries that may be obsolete.

Title Ranking

Title Ranking brings the art of Baker & Taylor's collection development expertise together with the science of data analytics to create a decision support system integrated with Title Source 360. Equip your library with the information to select the right titles and quantities, for the right locations.

Comparison peer groups have been developed, based on geographic region. These peer groups provide benchmark data to assist in title determination. Our staff will be pleased to work with the Library in selecting the best peer groups for comparison.

First Look Custom carts or ad hoc carts (built by the library) in Title Source 360 can be sent for ranking, where data metrics (such as author standing, series placement, publisher, BISAC Subject, pre/post order demand trends, inventory position, full text review profile, etc.) will be used to create a ranking for each title, as to its standing in its particular BISAC subject category. Additionally, a second set of metrics will rank the genre of the title (Adult, Juvenile, YA, Fiction, or Non-Fiction) in terms of that genre's overall circulation.

Title Source 360™ is designed to support library workflows, and is integrated with Baker & Taylor's collection development service FirstLook™ and your integrated library system (ILS).

2. What process will MALiA libraries follow to receive the vendor's discount rate(s), and when will the discount rate(s) be applied?

Members should identify their affiliation with MALIA when opening an account. MALIA member accounts will be coded and profiled for contracted discounts; any orders placed against these accounts will automatically receive contracted terms.

Discounts are applied to the publisher/producer list price, current at the point of shipment.

3. Vendor shall process and confirm new orders within 10 days of order receipt.

☒ Yes
☐ No

Remarks:

Orders placed electronically (Title Source website or Library ILS) will receive confirmation within minutes of order placement. Orders placed via toll free telephone will be confirmed on the call. Orders placed via email or fax will be confirmed within 24 hours of receipt of order.

4. What is your average order fulfillment time?

In-stock items ordered product only or case/mylar jacket only will be shipped within 1-2 business days of receipt of order. Orders requiring additional processing services will be shipped within 5-7 days of order. Any items not immediately available in inventory will be promptly backordered with the publishers. These items will be consolidated and shipped within 6 days of receipt from the publisher.

5. If unable to supply a title, vendor shall notify MALiA libraries within thirty (30) days and provide the reason for nonfulfillment.

☒ Yes
☐ No

Remarks:

Confirmation of the status of each line item ordered is provided immediately, at the point of order. Thereafter, status reports are generated with each invoice, providing information on any backordered items, as well as explanations for any cancelled items.

Additionally, to view status at any time:

Online Customer Support also allows customers to check the status of orders. Online Customer Support is available via our website at www.baker-taylor.com.

Online Customer Support

Online Customer Support (OCS), available via our website www.baker-taylor.com, is Baker & Taylor's free web-based account management system. The OCS system's sophisticated search options include the ability to query orders by Purchase Order Number, B&T Number, ISBN, and Order Date Range. You can also view detailed information, including order and account status by purchase order number, warehouse location, quantities and prices, and shipping details for UPS shipments. There's even an option that helps you print invoices and order details for your records.

Title Source website

Order status may be viewed within Title Source. As backordered items move through the fulfillment process and are shipped for delivery, the online status maintained in Title Source will update to reflect the activity.

6. Describe the vendor's order cancellation policy, including any restrictions that apply.

The Library will determine the backorder timeframe (number of days after order entry) for orders to remain open, and accounts will be profiled with that time parameter. Upon reaching the end of the backorder period, any items remaining on order will cancel automatically.

The Library may opt to cancel a title from order at any time prior to shipment.

7. 99% of materials supplied shall be the correct title, edition, and number of copies.

☒ Yes
☐ No

Remarks:

Quality control processes monitor the picking, packing, and shipping of your ordered titles.

8. Multiple copies of a physical item shall be shipped together.

☒ Yes
☐ No

Remarks:

The Library may profile accounts to receive or not to receive partial shipments, per line item ordered.

9. A packing slip shall accompany each physical shipment.

☒ Yes
☐ No

Remarks:

In an effort to expedite your shipments, Baker & Taylor has developed a detailed packing list, which enables the library to check in the order title by title, noting the price and quantity. Titles are listed alphabetically, by title.

10. The vendor shall supply multiple accounts for a MALiA library as needed, and ship materials for these accounts separately.

☒ Yes
☐ No

Remarks:

Accounts may be established as needed.

11. Will the vendor accept rush orders? If Yes, specify how the vendor defines "rush."

☒ Yes
☐ No

Remarks:

Our staff will be pleased to expedite material handling for in-stock items whenever possible; please contact your Customer Service Representative for assistance.

Standard delivery is provided via commercial carrier, ground freight. Expedited shipping services (overnight or 2 day air delivery) are available upon special request. Charges for requested expedited shipping will be invoiced to the Library.

12. Which of the following will the vendor accept? Select all that apply, and attach copies of existing policies that include any restrictions or conditions. If there are associated costs or limits on the amount refunded/credited, complete question 7 in section IV Overall Cost Considerations.

☒ Order returns
☒ Order exchanges (replacement product)
☒ Order credits

Remarks:

Please see Exhibit 4 for information on credits and returns. Baker & Taylor will accept the authorized return of items that are damaged, defective, or incorrectly shipped. The Library may opt to receive a replacement edition or account credit for the item in question.

13. Describe how MALiA libraries will submit claims and find out status.

Please contact Customer Service (Exhibit 5) with any issues regarding items missing from shipment or with questions regarding order or delivery status.

14. Within how many days of receipt will claims be processed by the vendor, and what is the vendor's average turn-around time for resolution?

Your Customer Service Representative will respond to any inquiry within 1 business day of receipt. Most general queries are resolved and reported back within 24-48 business hours. Should an inquiry require additional time to resolve, Customer Service will provide regular updates on the status of the case/inquiry until it is resolved.

15. Does the vendor support online order transfer from the local library's acquisition system? If Yes, specify requirements for MALiA libraries to participate, including any restrictions on the types of materials that can be transferred.

☒ Yes
☐ No

Remarks:

Baker & Taylor systems are compatible with any commercially produced ILS and many open source systems, supporting electronic order, acknowledgement, and invoicing functions, as available from the ILS. Electronic data exchange parameters are established upon request, at the point of account set-up.

16. Are there other aspects of orders and fulfillment the vendor would like to comment on that have not been covered in this section?

☒ Yes
☐ No

Remarks:

Our Title Source selection and ordering website, discussed above, may used as a standalone tool or may be integrated with the Library ILS. Our staff will be pleased to provide assistance with and training for use of the site at no additional charge. Basic service is available free of charge for all members.

III. INVOICES AND PAYMENT

1. Within how many days after the vendor receives an order should a MALiA library expect an invoice?
With the exception of subscription services, invoices are generated only at the point of product shipment.

2. Describe the vendor's standard invoicing practices in detail, including whether the vendor invoices partial orders or only when an order is complete.

Invoices are generated as product is shipped for delivery and include only those items shipped. The Library is not

invoiced from any ordered amount, but, rather, for the items filled from the order, as they are filled. Your invoices will list unit price, unit discount, and total discount price. Baker & Taylor invoices can list books alphabetically by author or title, or in the same sequence as the original purchase order. An invoice and status report will be mailed within 1 - 2 business days of the product shipment date, reporting on all items shipped and detailing the status of items not shipped.

3. Describe invoice customizations available to MALiA libraries.

Your invoices will list unit price, unit discount, and total discount price. Baker & Taylor invoices can list books alphabetically by author or title, or in the same sequence as the original purchase order. Cataloging/processing fees may appear on the bottom of the associated invoice or may be generated on a separate invoice.

4. Which of the following invoice types does the vendor provide?

☐ Print-only
☐ Electronic-only
☒ Both print and electronic

Remarks:

Print invoices may be mailed separately or enclosed with shipment. Electronic invoicing may be provided to any compatible ILS.

5. Provide a sample invoice that shows how discounts, credits, and service charges appear. If special invoice codes are used, provide a code translation reference.

Please see Exhibit 6.

6. The vendor is able to separately invoice multiple accounts for a MALiA library.

☒ Yes
☐ No

Remarks:

Each account is invoiced separately.

7. Is a penalty imposed for late payment of an invoice? If yes, indicate the time period and amount of the penalty.

☐ Yes
☒ No

Remarks:

Payment terms are net 30 days from the date of invoice.

8. Will the vendor provide discounts or credits for early payment of invoices? If Yes, describe and enumerate any early payment percentage schedules.

☐ Yes
☒ No

Remarks:

Payment terms are net 30 days from the date of invoice.

9. Will the vendor impose a penalty for late payment of an invoice? If Yes, indicate the time period and the penalty fee/rate.

☐ Yes
☒ No

Remarks:

Payment terms are net 30 days from the date of invoice.

10. Does the vendor accept credit card payment (American Express, VISA, MasterCard) without imposing an extra charge?

☒ Yes
☐ No

Remarks:

VISA, MasterCard, Discover

11. Are there other aspects of invoicing/payment the vendor would like to comment on that have not been covered in this section?

☐ Yes
☒ No

Remarks:

IV. OVERALL COST CONSIDERATIONS

1. On Attachment C, "Offeror Discount Pricing Sheet," list the discounts the vendor will provide to MALiA libraries during the contract period.

Please see Attachment C, as requested.

Baker & Taylor is pleased to propose discounts from the current publisher's list price. The discounts extended by Baker & Taylor are discounts from the current publisher's list price; however, publisher's list price is subject to change without notice. Your discount will be applied to the publisher's list price at the time of shipment. Please refer to Exhibit 1 for additional information.

Additionally, please find enclosed a brief description of Baker & Taylor's category types and their definitions (Exhibit 2). This will clarify the criteria used to classify a particular binding category.

"Baker & Taylor's Enhanced Services Program" (Exhibit 3) describes in detail a valuable service that will save time and money when procuring titles from small and hard to find publishers. By utilizing B&T's vast publisher and title database, the Library can purchase a wide variety of low demand and small print run titles from associations and limited edition, prepayment, and non-returnable publishers. These titles will be invoiced at list price plus a \$4.95 per unit surcharge.

2. Describe the vendor's service charges, and how they are calculated or vary depending on type of service. *"Baker & Taylor's Enhanced Services Program" (Exhibit 3) describes in detail a valuable service that will save time and money when procuring titles from small and hard to find publishers. By utilizing B&T's vast publisher and title database, the Library can purchase a wide variety of low demand and small print run titles from associations and limited edition, prepayment, and non-returnable publishers. These titles will be invoiced at list price plus a \$4.95 per unit surcharge.*

Please note, this is an optional service. Members may choose to automatically exclude these items from purchase.

3. The vendor shall not charge MALiA libraries for replacement copies of order items found to be defective, damaged, or lost in shipment, provided the loss is reported to the vendor by libraries within the publishers' designated time frame.

☒ Yes (we agree with item 3)
☐ No

Remarks:

4. If the publisher is unable to provide a replacement copy of an item found to be defective, damaged, or lost in shipment, the vendor shall seek to obtain a credit on behalf of the library.

☒ Yes
☐ No

Remarks:

We will be pleased to provide either product replacement, or, an account credit, as determined by the Library.

5. The vendor shall cover the cost of returning defective or damaged physical items, and arrange for pick-up.

☒ Yes
☐ No

Remarks:

6. Will the vendor provide free shipping/handling for physical materials? If No, describe exceptions (e.g. rush orders) and how shipping charges will be calculated.

☒ Yes
☐ No

Remarks:

All Library orders will be delivered FOB destination, with free shipping from the primary designated service center.

7. For order returns, exchanges, or credits, what extra charges or limits on the amount refunded/credited will be applied, if any?

None.

8. Describe the vendor's credit practices in detail, including under what circumstances the vendor will provide credits to MALiA libraries.

Please see Exhibit 4 for information on credits and returns. Baker & Taylor will accept the authorized return of items that are damaged, defective, or incorrectly shipped. The Library may opt to receive a replacement edition or account credit for the item in question.

9. Specify any one-time or recurring charges for electronic/digital hosting, access, setup, or ongoing support.

None

10. Describe any other one-time or recurring fees the vendor will charge MALiA libraries.

None

11. Are there other aspects of overall cost considerations the vendor would like to comment on that have not been covered in this section?

☒ Yes
☐ No

Remarks:

Please see Exhibits 1-4 for additional information.

V. CUSTOMER SERVICE

1. What are the vendor's customer service days and hours of availability? Include time zone.

Customer Service is available via toll free telephone, toll free fax, and email Monday through Friday from 8:00 am to 6:00 pm EST.

2. What is the size of the vendor's customer service staff?

For more personalized service, each customer account is assigned to a particular Representative. However, if the designated representative is out of the office, 12 other representatives are available to assist.

3. Specify the forms of vendor communication available to MALiA libraries. Select all that apply and provide the contact number/address.

☒ Toll-free phone#: *
☒ Fax#: *
☒ Email address: *
☒ Mail address: *
☒ Website address: www.baker-taylor.com
☒ Chat: *

* Please see Exhibit 5 for information.

4. The vendor shall respond to inquiries from MALiA libraries within 24 business hours.

☒ Yes
☐ No

Remarks:

Your Customer Service Representative will respond to any inquiry within 1 business day of receipt. Most general queries are resolved and reported back within 24-48 business hours. Should an inquiry require additional time to resolve, Customer Service will provide regular updates on the status of the case/inquiry until it is resolved.

5. Describe any other customer service guarantees the vendor will offer.

Your Customer Service Representative will respond to any inquiry within 1 business day of receipt. Most general queries are resolved and reported back within 24-48 business hours. Should an inquiry require additional time to resolve, Customer Service will provide regular updates on the status of the case/inquiry until it is resolved.

6. Provide a copy of the vendor's return policy.

Please see Exhibit 4.

7. How will the vendor notify MALiA libraries about new titles available for purchase?

Prepublication title information appears on our Title Source site as soon as it is released by the publisher/producer. Additionally, our staff provides online selection lists and publications to assist with the review and selection of new material. Please see Section I, item g, for details.

Our Automatic Shipment program, Automatically Yours, is described below. Please note, this service may be utilized as an automatic shipment program or as a title notification program, with an option to purchase.

Automatically Yours (Popular Author/Series Profiles)

Baker & Taylor's Automatically Yours program delivers the latest publications from popular authors right to your door.

Select your favorite authors, and Baker & Taylor will send the latest titles, as soon as they are released. Firm Order discounts will apply.

Automatically Yours has 8 different programs to choose from:

Popular Adult Fiction Authors – featuring over 1000 fiction authors

CATS Authors & Illustrators – featuring over 600 of the most popular children and young adult authors, both fiction and non-fiction.

CATS Awards – featuring more than 80 professionally selected national and international children's and teens awards

Spoken Word Audio

Large Print Popular Adult Fiction Authors

Book Club Plans - Baker & Taylor offers 4 different Book Club Plans to help meet your patrons' needs:

“Today” Show Book Club

Reading with Ripa Book Club

“Good Morning America” Book Club

“Oprah’s” Book Club

(although Oprah has discontinued her book club, she will occasionally recommend titles. We will continue to automatically ship these titles)

Inspirational Authors – Offers over 250 authors to choose

Graphic Novels - Available for Adult and Teen titles. Choose from 500 series.

CATS Series (Children's and Teens) (popular series automatic shipment)

This service provides the newest and most popular continuing series for public libraries, including picture books, easy-to-read, juvenile fiction and nonfiction, graphic novels/Manga/comic strip books, teen fiction and nonfiction, and Spanish/bilingual titles. New titles are shipped to you automatically upon publication when you request the series appropriate for your children's and teen collections.

Additionally, we provide confirmation reports on forthcoming titles including information such as ISBN, publisher, and order status.

8. What activities will MALiA libraries be able to do on the vendor's website? Select all that apply.

- ☐ Manage account profile (via Customer Service)
- ☒ View billing/payment activity (OnLine Customer Support)
- ☒ Place and track orders (Title Source)
- ☐ Cancel orders (via Customer Service)
- ☒ Request quotes (via Quotes@baker-taylor.com)
- ☒ Submit claims (Title Source)
- ☒ Request/review invoices (OnLine Customer Support)
- ☒ Look up titles (Title Source)
- ☒ Look up prices of materials and services (Title Source)
- ☒ Report problems/issues (Title Source)
- ☒ Run user reports (OnLine Customer Support)
- ☐ Other: _____

9. Describe the standard and customizable fiscal, management, and other reports the vendor will provide to MALiA libraries. Specify whether the libraries will be able to generate the reports themselves from the vendor's website, or if they will need to request the reports from the vendor. Include costs if applicable.

All reports discussed below are available free of charge. Invoices and Status reports are accessible online; the other reports will be generated by our staff, covering the timeframes as specified by the Library.

Status Report – Includes backordered items, as well as explanations for cancelled items. This report will be sent to the library with the associated invoice.

Packing List – In an effort to expedite your shipments, Baker & Taylor has developed a detailed packing list, which enables the library to check in the order title by title, noting the price and quantity. Titles are listed alphabetically, by title.

Invoice – Your invoices will list unit price, unit discount, and total discount price. Baker & Taylor invoices can list books alphabetically by author or title, or in the same sequence as the original purchase order. An invoice and status report will be mailed within 1 - 2 business days of the product shipment date, reporting on all items shipped and detailing the status of items not shipped.

Expenditure Report – This report may be created upon request and will list total units sold and dollars spent for a given time period.

Master Profile Report – A customer profile with shipment history, the master profile report provides a consolidated listing of all titles currently on Standing Order with Baker & Taylor. This report is available monthly, quarterly, semi-annually or annually upon request.

10. The vendor agrees to submit to the MALiA Contract Administrator an annual report of total usage of this agreement according to the following requirements:

- a. At the start of this contract, the vendor will email to contracts@malialibrary.org the contact info of the person who will submit the annual usage report, and notify the same email address if the contact information changes during the contract period.
- b. Row information on the report will include MALiA library name, address, PO #, PO Date, PO Item #, PO Item Description, and PO Item Amount in U.S. dollars.
- c. The report will provide subtotals that show the total amount purchased in U.S. dollars for each MALiA library customer.
- d. The report will show the grand total amount purchased in U.S. dollars across all MALiA library customers.
- e. The report will cover the period from July 1st of the preceding year to June 30th of the current year.
- f. The vendor will email the report to the MALiA Contract Administrator no later than September 1st of the current year.
- g. The MALiA Contract Administrator will share the report with the Library of Virginia procurement officer upon request.

☒ Yes

☐ No

Remarks:

11. Are there other aspects of customer service the vendor would like to comment on that have not been thoroughly covered in this section?

☐ Yes

☒ No

Remarks:

ATTACHMENT C

OFFEROR DISCOUNT PRICING SHEET

Offerors shall return a completed copy of this attachment with their proposals. If pricing differs by type of library (public, academic, school, special), the offeror shall submit a separate copy of this attachment and specify the type of library for which pricing is proposed.

All discounts quoted will be applied to the publishers' lowest list price in effect at the time of shipment and exclude freight-pass-through pricing.

Participating libraries reserve the right to request supporting documentation (including copies of the publishers' invoices) on discount or service charge decisions of the contractor at any time during the contract period.

The written statement of the offeror's proposed discount structure must be firm for the entire period of the contract.

I. PRINT BOOKS – Public Library

- Specify the print book discount rates the vendor will offer. In Comments, specify discount conditions/restrictions/other, if applicable.

Please see Exhibit 1 for a complete discount schedule and Exhibit 2 for material category definitions

Type	Discount Rate %		Minimum Order Amount, if any, for Discount Rate to Apply	Comments
	1 Copy	2+ Copy copies/title		
Trade Hardcover Category Def. I / II	45.0	2-4 copies= 45.5 5+ copies= 46.3	None	
Trade/Quality Paperback Category Def. III/IV	38.0	2-4 copies= 40.0 5+ copies= 41.0	None	
Mass Market Paperback Category Def. V	38.0	2-4 copies= 40.0 5+ copies= 41.0	None	
Prebound Category Def. XV	10.0	10.0	None	
Publishers' Binding Category Def VII	22.0	22.0	None	
Special Edition Binding *	0-45.0	0-45.0	None	*
Reinforced Binding Category Def. VI	22.0	2-4 copies= 25.0 5+ copies= 30.0	None	
Current/Popular *	0-45.0	0-45.0	None	*
Reference *	0-45.0	0-45.0	None	*
Large Print *	0-45.0	0-45.0	None	*
Non-English Language Category Def. X	0.0	0.0	None	
Graphic Novels *	0-45.0	0-45.0	None	*
University Press Category Def. VIII, Trade Eds.	15.0	15.0	None	
* may be of any binding or material category, see Exhibit 1 for a complete schedule				
Other - List Below:				
Board Books Category Def. XIII	22.0	2-4 copies= 25.0 5+ copies= 30.0	None	
Activity Books Category Def. XIV	22.0	2-4 copies= 25.0 5+ copies= 30.0	None	
Text, Technical, Reference, Professional Medical, Small Press, some University Press and/or Titles of Limited Demand Category Def. IX	0-22.0	0-22.0	None	Text, Technical, Reference= 0- 10.0% see Exhibit 1
Optional ESP Program Category XI	0+ \$4.95/unit	0+\$4.95/unit	None	

I. PRINT BOOKS – Academic and Special Libraries

1. Specify the print book discount rates the vendor will offer. In Comments, specify discount conditions/restrictions/other, if applicable.

Please see Exhibit 1, p.2 for a complete discount schedule and Exhibit 2 for material category definitions

Type	Discount Rate %		Minimum Order Amount, if any, for Discount Rate to Apply	Comments
	1 Copy	2+ Copy copies/title		
Trade Hardcover Category Def. I / II	42.0	42.0	None	
Trade/Quality Paperback Category Def. III/IV	38.0	38.0	None	
Mass Market Paperback Category Def. V	38.0	38.0	None	
Prebound Category Def. XV	10.0	10.0	None	
Publishers' Binding Category Def VII	22.0	22.0	None	
Special Edition Binding *	0-42.0	0-42.0	None	*
Reinforced Binding Category Def. VI	22.0	22.0	None	
Current/Popular *	0-42.0	0-42.0	None	*
Reference *	0-42.0	0-42.0	None	*
Large Print *	0-42.0	0-42.0	None	*
Non-English Language Category Def. X	0.0	0.0	None	
Graphic Novels *	0-42.0	0-42.0	None	*
University Press Category Def. VIII, Trade Eds.	15.0	15.0	None	
* may be of any binding or material category, see Exhibit 1 for a complete schedule				
Other - List Below:				
Board Books Category Def. XIII	22.0	22.0	None	
Activity Books Category Def. XIV	22.0	22.0	None	
Text, Technical, Reference, Professional Medical, Small Press, some U Press and/or Titles of Limited Demand Category Def. IX	0-22.0	0-22.0	None	Titles of minimal publisher discount = 10.0% see Exhibit 1
Optional ESP Program Category XI	0+ \$4.95/unit	0+\$4.95/unit	None	

2. Specify the print book cataloging/processing pricing the vendor will offer. In Comments, specify pricing conditions/restrictions/other, if applicable.

Type	Discount / Pricing		Minimum Order Amount, if any, for Discount/Pricing to Apply	Comments
	Attached	Unattached		
Catalog Card Package Per Book (pocket, spine label, circulation card, catalog card set)	\$1.83	\$1.83	None	
Circulation Card Package Per Book (pocket, spine label, circulation card, no catalog cards)	\$0.84	\$0.84	None	
Automation Processing Package Per Book (bar code, spine label, standard MARC record)	\$1.09	\$1.09	None	
Automation Shelf Ready Standard Package Per Book - (bar code, spine label, standard MARC record, theft detection)	\$1.84	\$1.84	None	
Automation Shelf Ready RFID Package Per Book - (spine label, RFID tag)	Applied only - \$0.85 RFID Applied and Linked - \$1.29	Applied only - \$0.85 RFID Applied and Linked - \$1.29	None	Vendor supplied tag
MARC Record - Standard	\$0.49	\$0.49	None	Per record
MARC Record - Custom	\$0.49	\$0.49	None	Per available edits within techXpress service
Date Due Slip	\$0.39	\$0.35	None	Per label
Pocket	\$0.30	\$0.30	None	Per label
Catalog Card Set	\$0.99	\$0.99	None	Per set
Circulation Card	\$0.25	\$0.25	None	Per card
Theft Detection	\$0.75	\$0.75	None	Per device
RFID Tag	Applied only - \$0.55 RFID Applied and Linked - \$0.99	Applied only - \$0.55 RFID Applied and Linked - \$0.99	None	Vendor supplied tag, per tag
Colibri Cover	N/A, see Other Paperback laminare			
Kapco Cover	N/A, see Other Paperback laminare			

Type	Discount / Pricing		Minimum Order Amount, if any, for Discount/Pricing to Apply	Comments
	Attached	Unattached		
Mylar - Applied Over Dust Cover	Glued-\$0.89 Taped-\$0.95	\$0.79	None	Per jacket
Other Paperback Laminate (Specify thickness)	7 mil-\$1.89 10 mil - \$2.29	7 mil-\$1.89 10 mil - \$2.29	None	
Bar Code Label	\$0.30	\$0.30	None	Per label
Custom Label	\$0.30	\$0.30	None	Per label
Spine Label	\$0.30	\$0.30	None	Per label
Colored Dots	No Bid	No Bid	None	
Label Protector	\$ 0.00	\$0.00	None	
Property Stamping	\$0.30	\$0.30	None	Per location
Property Label	\$0.30	\$0.30	None	Per label
Other - List Below (if package, specify components included):				

3. Will the vendor offer print book volume purchasing discounts?

 X Yes
 No

If Yes, describe:

Please see item 1 and Exhibit 1 for information on discounts for multiple copy quantities

4. Describe other discounts for print books and/or related services that the vendor will offer in addition to those specified in questions 1 through 3 above.

Please see item 1 and Exhibit 1 for information on product discount.

II. ELECTRONIC BOOKS

- Specify the electronic book discount rates the vendor will offer. In Comments, specify discount conditions/restrictions/other, if applicable.

Type	Discount Rate %		Minimum Order Amount, if any, for Discount Rate to Apply	Comments
	1 Copy	2+ Copy		
Fiction	0.0	0.0	None	eBook and eAudiobook content is available at publisher list price, as displayed in Title Source
Nonfiction	0.0	0.0	None	
Other - List Below:				
Platform/Hosting provided at no charge				

- Specify the electronic book cataloging/processing pricing the vendor will offer. In Comments, specify pricing conditions/restrictions/other, if applicable.

Type	Discount / Pricing		Minimum Order Amount, if any, for Discount/Pricing to Apply	Comments
	Attached	Unattached		
MARC Record – Standard	*	*	None	* Standard MRC is free of charge. Customization, depending upon requirements = \$ 1.00 - \$2.00 per record
MARC Record – Custom	*	*	None	* Standard MRC is free of charge. Customization, depending upon requirements = \$ 1.00 - \$2.00 per record
Other - List Below (if package, specify components included):				

- Will the vendor offer electronic book volume purchasing discounts?

☐ Yes
☒ No

If Yes, describe:

4. Describe other discounts for electronic books and/or related services that the vendor will offer in addition to those specified in questions 1 through 3 above.

All discounts are reflected above.

III. AUDIOBOOKS

- Specify the audiobook discount rates the vendor will offer. In Comments, specify discount conditions/restrictions/other, if applicable.

Type	Discount Rate %		Minimum Order Amount, if any, for Discount Rate to Apply	Comments
	1 Copy	2+ Copy copies per title		
Audiobook CD Category Def. XII.	45.0	2-4 copies= 45.5 5+ copies= 46.3	None	
Downloadable audio	0.0	0.0	None	Per Axis 360 digital platform
Streaming audio	No Bid	No Bid		
Fiction *	0-45.0	0-45.0	None	*
Nonfiction *	0-45.0	0-45.0	None	*
Current/Popular *	0-45.0	0-45.0	None	*
Non-English Language *	0-45.0	0-45.0	None	*
* may be of any material category, see Exhibit I for a complete schedule				
Other - List Below:				

- Specify the audiobook cataloging/processing pricing the vendor will offer. In Comments, specify pricing conditions/restrictions/other, if applicable.

Type	Discount / Pricing		Minimum Order Amount, if any, for Discount/Pricing to Apply	Comments
	Attached	Unattached		
Media Processing Package Per Item (removal of shrink wrap and security devices, re-package in standard case, insertion of scanned publisher artwork, label)	\$6.79	\$6.79	None	Per unit
MARC Record - Standard	\$0.49	\$0.49	None	Per record
MARC Record - Custom	\$0.49	\$0.49	None	Per available edits within techXpress service

Type	Discount / Pricing		Minimum Order Amount, if any, for Discount/Pricing to Apply	Comments
	Attached	Unattached		
Date Due Slip	\$0.39	\$0.35	None	Per label
Pocket	\$0.30	\$0.30	None	Per label
Catalog Card Set	\$0.99	\$0.99	None	Per set
Circulation Card	\$0.25	\$0.25	None	Per card
Theft Detection	\$0.75	\$0.75	None	Per device
RFID Tag	Applied only - \$0.55 RFID Applied and Linked - \$0.99	Applied only - \$0.55 RFID Applied and Linked - \$0.99	None	Vendor supplied tag, per tag (applied to case)
Bar Code Label	\$0.30	\$0.30	None	Per label
Custom Label	\$0.30	\$0.30	None	Per label
Spine Label	\$0.30	\$0.30	None	Per label
Label Protector	\$ 0.00	\$0.00	None	
Property Stamping	\$0.30	\$0.30	None	Per location
Property Label	\$0.30	\$0.30	None	Per label
Other - List Below (if package, specify components included):				

3. Will the vendor offer audiobook volume purchasing discounts?

X Yes

 No

If Yes, describe:

As shown above, multiple copy quantity

4. Describe other discounts for audiobooks and/or related services that the vendor will offer in addition to those specified in questions 1 through 3 above.

All discounts are reflected above.

\$2 73

IV. MUSIC

1. Specify the music discount rates the vendor will offer. In Comments, specify discount conditions/restrictions/other, if applicable.

Type	Discount Rate %		Minimum Order Amount, if any, for Discount Rate to Apply	Comments
	1 Copy	2+ Copy		
Music CD	25.0	25.0	None	
Downloadable music	No Bid	No Bid	None	
Streaming music	No Bid	No Bid	None	
Print music (e.g. scores, sheet music)	No Bid	No Bid	None	
Current/Popular	25.0	25.0	None	
Classical	25.0	25.0	None	
International	25.0	25.0	None	
Other - List Below:				

2. Specify the music cataloging/processing pricing the vendor will offer. In Comments, specify pricing conditions/restrictions/other, if applicable.

Type	Discount / Pricing		Minimum Order Amount, if any, for Discount/Pricing to Apply	Comments
	Attached	Unattached		
Media Processing Package Per Item (removal of shrink wrap and security devices, re-package in standard case, insertion of scanned publisher artwork, label)	\$2.65	\$2.65	None	Per unit, includes 3 embedded labels
MARC Record - Standard	\$0.75	\$0.75	None	Per record
MARC Record - Custom	\$1.50	\$1.50	None	Per available edits within techXpress service

Type	Discount / Pricing		Minimum Order Amount, if any, for Discount/Pricing to Apply	Comments
	Attached	Unattached		
Date Due Slip	\$0.39	\$0.35	None	Per label
Pocket	\$0.30	\$0.30	None	Per label
Catalog Card Set	\$0.99	\$0.99	None	Per set
Circulation Card	\$0.25	\$0.25	None	Per card
Theft Detection	\$0.75	\$0.75	None	Per device
RFID Tag	Applied only - \$0.55 RFID Applied and Linked - \$0.99	Applied only - \$0.55 RFID Applied and Linked - \$0.99	None	Vendor supplied tag, per tag (applied to case)
Bar Code Label	\$0.30	\$0.30	None	Per label
Custom Label	\$0.30	\$0.30	None	Per label
Spine Label	\$0.30	\$0.30	None	Per label
Label Protector	\$ 0.00	\$0.00	None	
Property Stamping	\$0.30	\$0.30	None	Per location
Property Label	\$0.30	\$0.30	None	Per label
Other - List Below (if package, specify components included):				
DGD2 Theft Detection	\$1.69	\$1.69	None	Per device

3. Will the vendor offer music volume purchasing discounts?

☐ Yes

☒ No

If Yes, describe:

4. Describe other discounts for music and/or related services that the vendor will offer in addition to those specified in questions 1 through 3 above.

All discounts are reflected above.

V. VIDEO

1. Specify the video discount rates the vendor will offer. In Comments, specify discount conditions/restrictions/other, if applicable.

Type	Discount Rate %		Minimum Order Amount, if any, for Discount Rate to Apply	Comments
	1 Copy	2+ Copy		
DVD	29.0	29.0	None	
Blu-ray	29.0	29.0	None	
Streaming video	No Bid	No Bid		
Feature/Entertainment	29.0	29.0	None	
Educational/Instruction	29.0	29.0	None	
TV Shows	29.0	29.0	None	
Animated	29.0	29.0	None	
Foreign	29.0	29.0	None	
Video games	No Bid	No Bid		
Other - List Below:				

2. Specify the video cataloging/processing pricing the vendor will offer. In Comments, specify pricing conditions/restrictions/other, if applicable.

Type	Discount / Pricing		Minimum Order Amount, if any, for Discount/Pricing to Apply	Comments
	Attached	Unattached		
Media Processing Package Per Item (removal of shrink wrap and security devices, re-package in standard case, insertion of scanned publisher artwork, label)	\$2.65	\$2.65	None	Per unit, includes 3 embedded labels
MARC Record - Standard	\$0.75	\$0.75	None	Per record
MARC Record - Custom	\$1.50	\$1.50	None	Per available edits within techXpress service

Type	Discount / Pricing	Minimum Order Amount, if any, for	Comments
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	Attached	Unattached	Discount/Pricing to Apply	
Date Due Slip	\$0.39	\$0.35	None	Per label
Pocket	\$0.30	\$0.30	None	Per label
Catalog Card Set	\$0.99	\$0.99	None	Per set
Circulation Card	\$0.25	\$0.25	None	Per card
Theft Detection	\$0.75	\$0.75	None	Per device
RFID Tag	Applied only - \$0.55 Applied and Linked -\$0.99	Applied only - \$0.55 RFID Applied and Linked -\$0.99	None	Vendor supplied tag, per tag (applied to case)
Bar Code Label	\$0.30	\$0.30	None	Per label
Custom Label	\$0.30	\$0.30	None	Per label
Spine Label	\$0.30	\$0.30	None	Per label
Label Protector	\$ 0.00	\$0.00	None	
Property Stamping	\$0.30	\$0.30	None	Per location
Property Label	\$0.30	\$0.30	None	Per label
Other - List Below (if package, specify components included):				
DCD2 Theft Detection	\$1.69	\$1.69	None	Per device

3. Will the vendor offer video volume purchasing discounts?

☐ Yes
☒ No

If Yes, describe:

4. Describe other discounts for video and/or related services that the vendor will offer in addition to those specified in questions 1 through 3 above.

All discounts are reflected above.

ATTACHMENT D

MALIA MEMBER LIBRARIES AS OF JANUARY 1, 2022

<u>Library Name</u>	<u>Member #</u>	<u>City, State</u>
Albemarle Regional Library	1129	Winton, NC
Alexander County Library	1103	Taylorsville, NC
Alleghany Highlands Regional Library	1197	Covington, VA
Amherst County Public Library	1001	Amherst, VA
Anne Arundel County Public Library	1293	Annapolis, MD
Appalachian Regional Library	1252	West Jefferson, NC
Appomattox Regional Library System	1002	Hopewell, VA
Arlington Public Library	1288	Arlington, VA
Augusta County Public Library	1089	Fishersville, VA
Bell County Public Library District	1319	Middlesboro, KY
Benton County Library	1220	Camden, TN
BHM Regional Library	1258	Washington, NC
Bishop Denis J. O'Connell High School	1329	Arlington, VA
Blackwater Regional Library	1004	Courtland, VA
Bland County Public Library	1297	Bland, VA
Blue Ridge Community College	1006	Weyers Cave, VA
Blue Ridge Regional Library	1007	Martinsville, VA
Boone County Public Library	1263	Burlington, KY
Botetourt County Public Library	1009	Roanoke, VA
Boynton Beach City Library	1265	Boynton Beach, FL
Bracken County Public Library	1289	Brooksville, KY
Braswell Memorial Library	1155	Rocky Mount, NC
Brevard College, J.A Jones Library	1116	Brevard, NC
Bridgewater College/Alexander Mack Mem. Library	1085	Bridgewater, VA
Bristol Public Library	1010	Bristol, VA
Buchanan County Public Library	1011	Grundy, VA
Cabarrus County Public Library	1167	Concord, NC
Cabell County Public Library	1311	Huntington, WV
Campbell County Public Library	1012	Rustburg, VA
Cape Fear Community College/Learning Resource	1188	Wilmington, NC
Caroline County Library	1112	Bowling Green, VA
Carroll County Public Schools	1015	Hillsville, VA
Carteret County Public Library System	1326	Beaufort, NC
Caswell County/Gunn Memorial Public Library	1200	Yanceyville, NC
Central Virginia Community College	1094	Lynchburg, VA
Central Virginia Regional Library	1314	Farmville, VA
Chapel Hill Public Library	1141	Chapel Hill, NC
Charles W. Gibson Library	1328	Buckhannon, WV

Charlotte Mecklenburg Library	1130	Charlotte, NC
Chatham County Public Library System	1271	Pittsboro, NC
Chesterfield County Public Library	1084	Chesterfield, VA
Chesterfield County Public Schools	1189	Midlothian, VA
Christopher Newport University/Trible Library	1213	Newport News, VA
City of Parkland Library	1295	Parkland, FL
Clarksville-Montgomery County Public Library	1241	Clarksville, TN
Clearwater Public Library System	1303	Clearwater, FL
Cleveland County Memorial Library	1123	Shelby, NC
Clifton Forge Public Library	1145	Clifton Forge, VA
Colonial Heights Public Library	1017	Colonial Heights, VA
Craft Memorial Library	1190	Bluefield, WV
Craig County Public Library	1115	New Castle, VA
Craven-Pamlico Regional Library	1327	New Bern, NC
Culpeper County Library	1114	Culpeper, VA
Cumberland County Public Library	1111	Cumberland, VA
Cynthiana-Harrison County Public Library	1240	Cynthiana, KY
Danville Community College	1019	Danville, VA
Davidson County Public Library	1152	Lexington, NC
Davie County Public Library	1212	Mocksville, NC
Doddridge County Public Library	1320	West Union, WV
Duplin County Library	1139	Kenansville, NC
Durham Technical Community College	1191	Durham, NC
East Albemarle Regional Library System	1186	Elizabeth City, NC
Eastern Shore Public Library	1022	Parksley, VA
ECPI University	1268	Virginia Beach, VA
Emory & Henry College/Kelly Library	1023	Emory, VA
Essex Public Library	1113	Tappahannock, VA
Fairfax County Public Schools	1328	Fairfax, VA
Fauquier County Public Library	1024	Warrenton, VA
Fauquier County Public Schools	1185	Warrenton, VA
Ferrum College/Stanley Library	1025	Ferrum, VA
Floyd County Public Library	1238	Prestonsburg, KY
Fontana Regional Library	1173	Bryson City, NC
Forsyth County Public Library	1306	Winston Salem, NC
Franklin County Library	1171	Louisburg, NC
Franklin County Public Library	1026	Rocky Mount, VA
Galax-Carroll Regional Library	1027	Galax, VA
Garrard County Public Library	1250	Lancaster, KY
Gassaway Public Library	1317	Gassaway, WV
Gaston County Public Library	1147	Gastonia, NC
Germanna Community College	1118	Fredericksburg, VA
Gibsonville Public Library	1255	Gibsonville, NC
Gloucester County Library	1087	Gloucester, VA
Graves County Public Library	1233	Mayfield, KY

Greensboro Public Library	1143	Greensboro, NC
Greenup County Public Library	1285	Greenup, KY
Halifax County South Boston Public Library System	1028	Halifax, VA
Hampshire County Public Library	1243	Romney, WV
Hampton Public Library	1092	Hampton, VA
Handley Regional Library	1099	Winchester, VA
Hanover County Public Schools	1136	Ashland, VA
Hardin County Public Library	1279	Elizabethtown, KY
Hardy County Public Library	1196	Moorefield, WV
Haywood County Public Library	1170	Waynesville, NC
Heartland Library Cooperative	1264	Sebring, FL
Henderson County Public Library	1153	Hendersonville, NC
Henrico County Public Library	1018	Henrico, VA
Henrico County Public Schools	1135	Henrico, VA
Heritage Public Library	1029	New Kent, VA
Hickory Public Library	1256	Hickory, NC
Hocutt-Ellington Memorial Library	1214	Clayton, NC
J. Sargeant Reynolds Community College	1030	Richmond, VA
James L. Hamner Public Library/Amelia County	1083	Amelia Court House, VA
Jefferson-Madison Regional Library	1031	Charlottesville, VA
Jessamine County Public Library	1210	Nicholasville, KY
John Tyler Community College Library	1032	Chester, VA
Johnson City Public Library	1033	Johnson City, TN
Kanawha County Public Library	1236	Charleston, WV
Kenton County Public Library	1325	Erlanger, KY
Lancaster Community Library	1035	Kilmarnock, VA
Library of Virginia	1134	Richmond, VA
Lighthouse Point Library	1313	Lighthouse Point, FL
Lincoln County Public Library	1128	Lincolnton, NC
Logan County Public Library	1232	Russellville, KY
Lonesome Pine Regional Library	1036	Wise, VA
Lord Fairfax Community College/Paul Wolk Library	1037	Middletown, VA
Lynchburg Public Library	1038	Lynchburg, VA
Maitland Public Library	1290	Maitland, FL
Marion County Public Library	1281	Fairmont, WV
Martinsburg-Berkeley County Public Library	1175	Martinsburg, WV
Mary Riley Styles Public Library	1039	Falls Church, VA
Mary Wood Weldon Memorial Library	1277	Glasgow, KY
Mason County Public Library	1211	Point Pleasant, WV
Mauney Memorial Library	1133	Kings Mountain, NC
McCracken County Public Library	1296	Paducah, KY
McDowell County Public Library	1146	Marion, NC
Mecklenburg County Public Library	1126	Boydton, VA
Meherrin Regional Library	1040	Lawrenceville, VA
Montgomery County Public Library	1235	Mount Sterling, KY

Montgomery-Floyd Regional Library	1041	Christiansburg, VA
Mooneyham Public Library	1174	Forest City, NC
Morgantown Public Library	1208	Morgantown, WV
Mountain Empire Community College/Wampler Library	1042	Big Stone Gap, VA
Nassau County Public Library System	1315	Fernandina Beach, FL
New Hanover County Public Library	1216	Wilmington, NC
New Martinsville Public Library	1205	New Martinsville, WV
New River Community College	1091	Dublin, VA
Newport News Public Library System	1044	Newport News, VA
Norfolk Academy	1302	Norfolk, VA
Norfolk Public Library	1045	Norfolk, VA
Norfolk State University, Lyman Beecher Brooks Library	1249	Norfolk, VA
Norris Public Library	1247	Rutherfordton, NC
Northern Virginia Community College	1132	Annandale, VA
Northumberland Public Library	1047	Heathsville, VA
Northwestern Regional Library	1165	Elkin, NC
Oldham County Public Library	1304	La Grange, KY
Oneonta Public Library	1301	Oneonta, AL
Orange County Public Library	1117	Orange, VA
Pamunkey Regional Library	1048	Hanover, VA
Paris-Bourbon County Library	1274	Paris, KY
Patrick Henry Community College/Lester Library	1049	Martinsville, VA
Paul Sawyer Public Library	1266	Frankfort, KY
Pearisburg Public Library	1050	Pearisburg, VA
Pender County Public Library	1138	Burgaw, NC
Pendleton County Public Library	1183	Franklin, WV
Perry Memorial Library	1223	Henderson, NC
Petersburg Public Library System	1051	Petersburg, VA
Piedmont Virginia Community College	1102	Charlottesville, VA
Pittsylvania County Public Library	1052	Chatham, VA
Polk County Library Cooperative	1267	Bartow, FL
Polk County Public Library	1184	Columbus, NC
Poquoson Public Library	1053	Poquoson, VA
Powhatan County Public Library	1088	Powhatan, VA
Prince William Public Library System	1054	Prince William, VA
Public Library of Anniston-Calhoun County	1292	Anniston, AL
Public Library of Johnston County & Smithfield	1160	Smithfield, NC
Pulaski County Library System	1055	Pulaski, VA
Pulaski County Public Library	1283	Somerset, KY
Radford Public Library	1056	Radford, VA
Radford University/McConnell Library	1056	Radford, VA
Raleigh County Public Library	1259	Beckley, WV
Randolph County Public Library	1221	Asheboro, NC

Rappahannock County Library	1206	Washington, VA
Richard C. Sullivan Public Library	1324	Wilton Manors, FL
Richmond Public Library	1108	Richmond, VA
Ritchie County Public Library	1177	Harrisville, WV
Roanoke City Public Library	1109	Roanoke, VA
Roanoke County Public Library	1059	Roanoke, VA
Robeson County Public Library	1164	Lumberton, NC
Rockbridge Regional Library	1120	Lexington, VA
Rowan Public Library	1150	Salisbury, NC
Russell County Public Library	1061	Lebanon, VA
Rutherford County Library System	1228	Murfreesboro, TN
Sandhill Regional Library	1321	Rockingham, NC
Scott County Public Library	1262	Georgetown, KY
Shenandoah County Library	1179	Edinburg, VA
Sheppard Memorial Library	1182	Greenville, NC
Smyth County Public	1066	Marion, VA
Southern Pines Public Library	1158	Southern Pines, NC
Southside VA Community College	1203	Keysville, VA
Southwest Virginia Community College	1067	Richlands, VA
Spindale Public Library	1163	Spindale, NC
Spring Hill Public Library	1312	Spring Hill, TN
Stanly County Public Library	1195	Albemarle, NC
State Library of North Carolina	1248	Raleigh, NC
Staunton Public Library	1068	Staunton, VA
Suffolk Public Library System	1069	Suffolk, VA
Sullivan County Public Library	1070	Blountville, TN
Tazewell County Public Library	1071	Tazewell, VA
Temple Rodef Shalom Library	1257	Falls Church, VA
Tennessee State Library and Archives	1199	Nashville, TN
Thomas Nelson Community College	1072	Hampton, VA
Tidewater Community College	1100	Norfolk, VA
Transylvania County Library	1156	Brevard, NC
Union County Public Library	1140	Monroe, NC
University of Virginia College at Wise/Wyllie Library	1124	Wise, VA
Upshur County Public Library	1244	Buckhannon, WV
Vienna Public Library	1192	Vienna, WV
Virginia Beach Public Library	1073	Virginia Beach, VA
Virginia Department of Corrections	1201	Richmond, VA
Virginia Department of Juvenile Justice	1309	Richmond, VA
Virginia Museum of Fine Arts	1316	Richmond, VA
Virginia Western Community College	1077	Roanoke, VA
Washington County Public Library	1078	Abingdon, VA
Wayne County Public Library	1168	Goldsboro, NC
Waynesboro Public Library	1079	Waynesboro, VA
Whitley County Public Library	1215	Williamsburg, KY

William & Mary, Wolf Law Library
Williamsburg Regional Library
Wilson County Public Library
Wythe-Grayson Regional Library
York County Public Library

1149 Williamsburg, VA
1080 Williamsburg, VA
1162 Wilson, NC
1098 Independence, VA
1305 Yorktown, VA

ATTACHMENT E – MUST BE COMPLETED

Small Business Subcontracting Plan

It is the goal of the Commonwealth that over 42% of its purchases be made from small businesses. All potential bidders are required to include this document with their bid response in order to be considered responsive.

Small Business: "Small business (including micro)" means a business which holds a certification as such by the Virginia Department of Small Business and Supplier Diversity (DSBSD) on the due date for bids. This shall also include DSBSD-certified women-owned and minority-owned businesses and businesses with DSBSD service disabled veteran owned status when they also hold a DSBSD certification as a small business on the bid due date. Currently, DSBSD offers small business certification and micro business designation to firms that qualify.

Certification applications are available through DSBSD online at www.SBSD.virginia.gov (Customer Service).

Bidder Name: Baker & Taylor, LLC

Preparer Name: Lee Ann Queen, Director-Pricing Services

Date: March 1, 2022

Who will be doing the work: ☐ I plan to use subcontractors

☒ I plan to complete all work

Instructions

- A. If you are certified by the DSBSD as a micro/small business, complete only Section A of this form.
- B. If you are not a DSBSD-certified small business, complete Section B of this form. For the bid to be considered and the bidder to be declared responsive, the bidder shall identify the portions of the contract that will be subcontracted to DSBSD-certified small business for the initial contract period in relation to the bidder's total price for the initial contract period in Section B.

Section A

If your firm is certified by the DSBSD provide your certification number and the date of certification.

Certification number: _____

Certification Date: _____

Section B

If the "I plan to use subcontractors box is checked," populate the requested information below, per subcontractor to show your firm's plans for utilization of DSBSD-certified small businesses in the performance of this contract for the initial contract period in relation to the bidder's total price for the initial contract period. Certified small businesses include but are not limited to DSBSD-certified women-owned and minority-owned businesses and businesses with DSBSD service disabled veteran-owned status that have also received the DSBSD small business certification. Include plans to utilize small businesses as part of joint ventures, partnerships, subcontractors, suppliers, etc. It is important to note that these proposed participation will be incorporated into the subsequent contract and will be a requirement of the contract. Failure to obtain the proposed participation dollar value or percentages may result in breach of the contract.

B. Plans for Utilization of DSBSD-Certified Small Businesses for this Procurement

Subcontract #1

Company Name: _____ SBSD Cert #: _____ Contact

Name: _____ SBSD Certification: _____ Contact

Phone: _____ Contact Email: _____

Value % or \$ (Initial Term): _____ Contact Address: _____
Description of Work: _____

Subcontract #2

Company Name: _____ SBSD Cert #: _____ Contact
Name: _____ SBSD Certification: _____ Contact
Phone: _____ Contact Email: _____ Value %
or \$ (Initial Term): _____ Contact Address: _____
Description of Work: _____

Subcontract #3

Company Name: _____ SBSD Cert #: _____ Contact
Name: _____ SBSD Certification: _____ Contact
Phone: _____ Contact Email: _____ Value %
or \$ (Initial Term): _____ Contact Address: _____
Description of Work: _____

Subcontract #4

Company Name: _____ SBSD Cert #: _____ Contact
Name: _____ SBSD Certification: _____ Contact
Phone: _____ Contact Email: _____ Value %
or \$ (Initial Term): _____ Contact Address: _____
Description of Work: _____

Subcontract #5

Company Name: _____ SBSD Cert #: _____ Contact
Name: _____ SBSD Certification: _____ Contact
Phone: _____ Contact Email: _____ Value %
or \$ (Initial Term): _____ Contact Address: _____ Description
of Work: _____

ATTACHMENT F - MUST BE COMPLETED

Virginia State Corporation Commission (SCC) registration information.

The offeror:

**Baker &
Taylor, LLC**

Lee Ann J. Taylor

X is a corporation or other business entity with the following SCC identification number:

T0602807

-OR-

☐ is not a corporation, limited liability company, limited partnership, registered limited liability partnership, or business trust **-OR-**

☐ is an out-of-state business entity that does not regularly and continuously maintain as part of its ordinary and customary business any employees, agents, offices, facilities, or inventories in Virginia (not counting any employees or agents in Virginia who merely solicit orders that require acceptance outside Virginia before they become contracts, and not counting any incidental presence of the offeror in Virginia that is needed in order to assemble, maintain, and repair goods in accordance with the contracts by which such goods were sold and shipped into Virginia from offeror's out-of-state location) **-OR-**

☐ is an out-of-state business entity that is including with this proposal an opinion of legal counsel which accurately and completely discloses the undersigned offeror's current contacts with Virginia and describes why those contacts do not constitute the transaction of business in Virginia within the meaning of § 13.1-757 or other similar provisions in Titles 13.1 or 50 of the Code of Virginia.

****NOTE**** >> Check the following box if you have not completed any of the foregoing options but currently have pending before the SCC an application for authority to transact business in the Commonwealth of Virginia and wish to be considered for a waiver to allow you to submit the SCC identification number after the due date for proposals (the Commonwealth reserves the right to determine in its sole discretion whether to allow such waiver): ☐

ATTACHMENT G - MUST BE COMPLETED

Proprietary/Confidential Information Identification

Trade secrets or proprietary information submitted by an Offeror shall not be subject to public disclosure under the *Virginia Freedom of Information Act*; however, the Offeror must invoke the protections of § 2.2-4342F of the *Code of Virginia*, in writing, either before or at the time the data or other material is submitted. The written notice must specifically identify the data or materials to be protected including the section of the proposal in which it is contained and the page numbers, and state the reasons why protection is necessary. The proprietary or trade secret material submitted in the original and all copies of the proposal must be identified by some distinct method such as highlighting or underlining and must indicate only the specific words, figures, or paragraphs that constitute trade secret or proprietary information. In addition, a summary of proprietary information submitted shall be submitted on this form. The classification of an entire proposal document, line item prices, and/or total proposal prices as proprietary or trade secrets is not acceptable. If, after being given reasonable time, the Offeror refuses to withdraw such a classification designation, the proposal will be rejected.

Name of Offeror (Firm): Baker & Taylor, LLC invokes the protections of § 2.2-4342F of the *Code of Virginia* for the following portions of my proposal submitted on March 1, 2022.

Date 3-1-2022

Signature: Lee Ann Queen Lee Ann Queen

Title: Director-Pricing Services

☒ No portion of this bid / proposal is to be considered confidential and/or proprietary.

DATA/MATERIAL TO BE PROTECTED	SECTION NO., & PAGE NO.	REASON WHY PROTECTION IS NECESSARY

ATTACHMENT H - URFP Checklist

Be sure to complete and/or submit the following information with your completed proposal package.

- 1.) Cover Sheet
- 2.) Offeror Data Sheet (Attachment A)
- 3.) Service Requirements Deemed Important in Consideration of Vendor Selection (Attachment B)
- 4.) Offeror Discount Pricing Sheet (Attachment C)
- 5.) Small Business Subcontracting Plan (Attachment E)
- 6.) Virginia SCC Registration Information (Attachment F)
- 7.) Proprietary/Confidential Information Identification (Attachment G)

Exhibit 1

Baker & Taylor
Terms and Conditions of Sale (Firm Order Print Book/Spoken Word Audio and Continuation Services)
MALIA – Public Library Members

Baker & Taylor is pleased to offer the discount terms and conditions contained in this Exhibit 1. The pricing grid below provides discounts for each product category offered by Baker & Taylor.

Product Category	Category Definition (a)	Price Indicator	Discount	
I.	Adult Trade Hardcover Editions (Popular Fiction & Non-Fiction, and may include some spoken word audio)	0 (zero) (Hardcover Trade Editions) C (Hardcover Computer Books)	1 copy/title: 45.0% 2-4 copies/title: 45.5% 5+ copies/title: 46.3%	
II.	Juvenile Trade Hardcover Editions (Popular Fiction & Non-Fiction)	J	1 copy/title: 45.0% 2-4 copies/title: 45.5% 5+ copies/title: 46.3%	
III.	Adult Quality Paperback Editions (Popular Fiction & Non-Fiction)	B (Paperback Trade Editions) C (Paperback Computer Books)	1 copy/title: 38.0% 2-4 copies/title: 40.0% 5+ copies/title: 41.0%	
IV.	Juvenile Quality Paperback Editions (Popular Fiction & Non-Fiction)	G	1 copy/title: 38.0% 2-4 copies/title: 40.0% 5+ copies/title: 41.0%	
V.	Mass Market Paperback Editions	P	1 copy/title: 38.0% 2-4 copies/title: 40.0% 5+ copies/title: 41.0%	
VI.	Single Edition Reinforced (Juvenile)	R	1 copy/title: 22.0% 2-4 copies/title: 25.0% 5+ copies/title: 30.0%	
VII.	Publisher's Library Edition (Juvenile)	Z	22.0%	
VIII.	University Press Trade Edition (May be of any binding and include some spoken word audio)	A	15.0%	
IX.	Text, Technical, Reference, Professional Medical, Small Press, some University Press titles (excluding University Press Trade Editions) and/or Titles of Limited Demand (may be of any binding and include some spoken word audio.)	S/X/N - (Text, Technical, or Reference Editions) L - (Hardcover Editions from Small Press and Hardcover Titles of Limited Demand—primarily Adult) 7 - (Hardcover Titles of Limited Demand—primarily Juvenile) M - (Paperback Editions from Small Press and Paperback Titles of Limited Demand—primarily Adult) 1 - (Paperback Titles of Limited Demand—primarily Juvenile) T/U/V/W/4/Letter O: (Specialty Textbooks) 5/6/8 (Professional Medical Titles)	S = 10.0% X = 10.0% N = 0.0% (b) L = 10.0% (c)(d) 7 = see Cat. VI (d) M = 10.0% (c)(d) 1 = see Cat. VI (d) T = 0.0% U = 0.0% V = 0.0% W = 0.0%	4 = 0.0% Letter O = 15.0% 5 = 0.0% 6 = 0.0% 8 = 0.0%
X.	Imported English and Non-English Language Editions	F/K/3	0.0%	
XI.	Enhanced Service Program (Optional Service)	Q / Y	0.0% + \$4.95/unit (e)	
XII.	Spoken Word Audio	H	1 copy/title: 45.0% 2-4 copies/title: 45.5% 5+ copies/title: 46.3%	
XIII.	Board Books	I	See Cat. VI	
XIV.	Novelty Items/Activity Books	I	See Cat. VI	
XV.	Special Programs, such as: - PawPrint Editions - Turtleback Editions	D (PawPrint Editions) E (Turtleback Editions)	D = 10.0% E = 10.0%	

(a) Please see Exhibit 2 for full category definitions, which are attached hereto and incorporated herein by reference. Material produced for Text Stream print-on-demand services may fall into any category.

(b) Titles which receive minimal publisher discount will be invoiced at publisher's list price.

(c) Represents publishers with limited sales volume, based upon a semi-annual review. These titles may be of any binding type or publisher of origin.

(d) Represents individual titles which do not qualify for preferred stock status (based upon a quarterly review) and individual titles which qualify for preferred stock status but have limited demand (calculated over a rolling 12 month period). These titles may be of any binding type or publisher of origin.

(e) Titles where Baker & Taylor receives no discount from the publisher or prepayment is required by the publisher or publishers whose titles have limited demand and/or non-commercial publishers will be invoiced at list price plus \$4.95/unit service charge.

Baker & Taylor
Terms and Conditions of Sale (Firm Order Print Book/Spoken Word Audio and Continuation Services)
MALIA – Academic Library Members / Special Library Members

Baker & Taylor is pleased to offer the discount terms and conditions contained in this Exhibit 1. The pricing grid below provides discounts for each product category offered by Baker & Taylor.

Product Category	Category Definition (a)	Price Indicator	Discount	
I.	Adult Trade Hardcover Editions (Popular Fiction & Non-Fiction, and may include some spoken word audio)	0 (zero) (Hardcover Trade Editions) C (Hardcover Computer Books)	42.0%	
II.	Juvenile Trade Hardcover Editions (Popular Fiction & Non-Fiction)	J	42.0%	
III.	Adult Quality Paperback Editions (Popular Fiction & Non-Fiction)	B (Paperback Trade Editions) C (Paperback Computer Books)	38.0%	
IV.	Juvenile Quality Paperback Editions (Popular Fiction & Non-Fiction)	G	38.0%	
V.	Mass Market Paperback Editions	P	38.0%	
VI.	Single Edition Reinforced (Juvenile)	R	22.0%	
VII.	Publisher's Library Edition (Juvenile)	Z	22.0%	
VIII.	University Press Trade Edition (May be of any binding and include some spoken word audio)	A	15.0%	
IX.	Text, Technical, Reference, Professional Medical, Small Press, some University Press titles (excluding University Press Trade Editions) and/or Titles of Limited Demand (may be of any binding and include some spoken word audio.)	S/X/N - (Text, Technical, or Reference Editions) L - (Hardcover Editions from Small Press and Hardcover Titles of Limited Demand—primarily Adult) 7 - (Hardcover Titles of Limited Demand—primarily Juvenile) M - (Paperback Editions from Small Press and Paperback Titles of Limited Demand—primarily Adult) 1 - (Paperback Titles of Limited Demand—primarily Juvenile) T/U/V/W/4/Letter O: (Specialty Textbooks) 5/6/8 (Professional Medical Titles)	S = 10.0% X = 10.0% N = 10.0% (b) L = 10.0% (c)(d) 7 = 22.0% (d) M = 10.0% (c)(d) 1 = 22.0% (d) T = 0.0% U = 0.0% V = 0.0% W = 0.0%	4 = 0.0% Letter O = 15.0% 5 = 0.0% 6 = 0.0% 8 = 0.0%
X.	Imported English and Non-English Language Editions	F/K/3	0.0%	
XI.	Enhanced Service Program (Optional Service)	Q / Y	0.0% + \$4.95/unit (e)	
XII.	Spoken Word Audio	H	1 copy/title: 45.0% 2-4 copies/title: 45.5% 5+ copies/title: 46.3%	
XIII.	Board Books	I	22.0%	
XIV.	Novelty Items/Activity Books	I	22.0%	
XV.	Special Programs, such as: - PawPrint Editions - Turtleback Editions	D (PawPrint Editions) E (Turtleback Editions)	D = 10.0% E = 10.0%	

(a) Please see Exhibit 2 for full category definitions, which are attached hereto and incorporated herein by reference. Material produced for Text Stream print-on-demand services may fall into any category.

(b) Titles which receive minimal publisher discount will be invoiced at publisher's list price.

(c) Represents publishers with limited sales volume, based upon a semi-annual review. These titles may be of any binding type or publisher of origin.

(d) Represents individual titles which do not qualify for preferred stock status (based upon a quarterly review) and individual titles which qualify for preferred stock status but have limited demand (calculated over a rolling 12 month period). These titles may be of any binding type or publisher of origin.

(e) Titles where Baker & Taylor receives no discount from the publisher or prepayment is required by the publisher or publishers whose titles have limited demand and/or non-commercial publishers will be invoiced at list price plus \$4.95/unit service charge.

Baker & Taylor
Terms and Conditions of Sale
(DVD / Blu-ray / Music CD Products)
MALIA- All Member Libraries

Discount applied to the manufacturer's current list price at the time of shipment.

Price Indicator	Definition	Discount
2	Music Compact Disc	25.0%
9	DVD	29.0%
9	Blu-ray	29.0%

List prices are manufacturer's suggested list prices, where available. In instances where no list price is supplied by the manufacturer, a list price will be assigned by Baker & Taylor.

PLEASE NOTE: CATALOGING/PROCESSING SERVICES ARE NOT AVAILABLE FOR PRODUCT ISSUED BY BUENA VISTA HOME ENTERTAINMENT, AKA WALT DISNEY STUDIOS HOME ENTERTAINMENT (BVHE).

Also, please note that:

- Publisher's list price is subject to change without notice.
- Except where otherwise noted, book discounts are applied to current publisher's list price at the time of shipment.
- Baker & Taylor reserves the sole right to be the final determinant of product categories, category definitions and price indicators. The discounts vary based on this determination.
- Titles are categorized by Baker & Taylor for pricing purposes by considering the binding, general marketing categories, demand for certain titles, preferred stock status, cost of acquisition, cost of distribution, and the size or type of publisher, as well as factors related to relationships with publishers such as shipping terms, payment terms, publisher's discount, returnability to publishers and other factors.
- Product categories, category definitions and price indicators are subject to change at Baker & Taylor's sole discretion, without notice, based upon the above-described factors for categorizing titles.
- For domestic titles where no publisher list price is assigned by the publisher, Baker & Taylor will assign such titles a price in its electronic catalog which is based upon Baker & Taylor's estimate of market conditions.
- For imported titles where no publisher list price is assigned by the publisher for the U.S. market, Baker & Taylor will assign such titles a U.S. dollar price in its electronic catalog which is based upon Baker & Taylor's estimate of market conditions.
- For PawPrint editions, Baker & Taylor will assign such titles a price in its electronic catalog which is based upon Baker & Taylor's estimate of market conditions.
- Titles of limited demand or from small or specialty publishers generally are included in Product Category IX or Product Category XI.
- The discount terms and conditions in this Exhibit 1 do not apply to Baker & Taylor's Approval Programs.
- Baker & Taylor provides an invoice that identifies the publisher's current list price, the discount offered, and the exact price charged for each title ordered.

Exhibit 2

Category Definitions

- I. **Adult Trade Hardcover Editions (O, C)** *(may include some spoken word audio materials)*
High demand materials from widely distributed publishers designed for the general consumer, usually dealing with a subject matter having broad mass appeal. These titles are typically released in hardback and can be either fiction or current non-fiction. Publisher promotional/media expenditures and print runs are customarily higher for these titles than for most others. Inventory is maintained with preferred stock status (regularly stocked in three to four major warehouses). An example of a trade edition would be: 14th Deadly Sin by James Patterson, ISBN: 9780316404021.
- II. **Juvenile Trade Hardcover Editions (J)**
High demand, juvenile materials from widely distributed publishers designed for the general consumer, usually dealing with a subject matter having broad mass appeal. These titles are typically released in hardback and can be either fiction or current non-fiction. Publisher promotional/media expenditures and print runs are customarily higher for these titles than for most others. Inventory is maintained with preferred stock status (regularly stocked in three to four major warehouses). An example of a trade edition would be: Are You Ready to Play Outside by Mo Willems, ISBN: 9781423113478.
- III. **Adult Quality Paperback Editions (B, C)**
High demand paperback materials from widely distributed publishers, other than the standard rack size paperback, typically found in bookstores and other retail outlets. Inventory is maintained with preferred stock status (regularly stocked in three to four major warehouses). An example of a quality paperback would be: The Boys in the Boat by Daniel Brown, ISBN 9780143125471.
- IV. **Juvenile Quality Paperback Editions (G)**
High demand, juvenile paperback materials from widely distributed publishers, other than the standard rack size paperback, typically found in bookstores and other retail outlets. Inventory is maintained with preferred stock status (regularly stocked in three to four major warehouses). An example of a quality paperback would be: Tuck Everlasting by Natalie Babbitt, ISBN: 9780312369811.
- V. **Mass Market Paperback Editions (P)**
A standard rack size paperback typically found in bookstores or other retail outlets. An example of a mass market paperback would be: The City of Ember by Jeanne Duprau, ISBN: 9780375822742.
- VI. **Single Edition Reinforced (R)**
A high quality binding designed to provide a long shelf life in a heavy use environment. Although the binding is fanned and glued it may not be sewn, which is typically found in the publisher library edition. Subject content can include both fictional and non-fiction works appealing to juveniles as well as adults. These bindings are identified by the publisher to Baker & Taylor. An example of a single edition reinforced binding would be: Because of Winn Dixie by Kate DiCamillo, ISBN 9780763650070.
- VII. **Publisher Library Editions (Z)**
Fiction as well as non-fiction materials appealing to both juveniles and adults, designed with the rugged durability required of the environment typically found in a library setting. Publisher Library Editions are traditionally of the highest quality, usually fanned, sewn and glued to provide the greatest possible shelf life of any binding. These bindings are identified by the publisher to Baker & Taylor. An example of a publisher library edition would be: Curious George Visits the Library by Margaret Rey, ISBN: 9781599614199.
- VIII. **University Press Trade Editions (A)** *(may include some spoken word audio materials)*
This category would include any University Press Trade Editions, both adult and juvenile, and are subject to publisher reclassification. An example of a university press trade edition would be: Alexander McQueen: Savage Beauty by Andrew Bolton, ISBN: 9780300169782.
- IX. **Text, Technical, Reference, Small Press, and/or Titles of Limited Demand (S, X, N, L, M, V, T, U, W, Letter O, 1, 4, 5, 6, 7, 8)**
Category of materials includes, but is not limited to, text, technical, reference, professional medical, small press, and some university press titles (excluding University Press Trade Editions). It includes titles purchased from publishers on a non-returnable basis, those publishers that extend little discount to Baker & Taylor, and publishers whose titles have limited sales volume based upon a semi-annual review.

It includes individual titles which do not qualify for preferred stock status (based upon a quarterly review) and individual titles which qualify for preferred stock status, but have limited demand (calculated over a rolling 12 month period). Additionally, any publisher which is not in compliance with some of Baker & Taylor's purchasing requirements could be in this category. Materials in this category are both adult and juvenile, may be of any binding and may include some spoken word audio materials.

Examples within this category would be: The Merck Index, ISBN: 9781849736701, Strategies That Work, ISBN: 9781571104816, Beauty and the East ISBN: 9781566563871, Generals of the Bulge: Leadership in the U.S. Army's Greatest Battle, ISBN 9780811711999, and Floods, ISBN 9781624030031.
- X. **Imported English and Non-English Language Editions (F, K, 3)**
Titles produced and distributed outside of the domestic US. These titles may be of any binding type and represent various publishers. An example would be El Angel Caído by Nalini Singh, ISBN 9788490625224.
- XI. **Enhanced Service Program Titles (Y/Q)**
This category includes materials where Baker & Taylor receives no discount from the publisher, or prepayment is required by the publisher, or publishers which have restrictions on returns, or books of small or non-commercial publishers with limited sales volume based upon a semi-annual review. Any publisher which is not in compliance with Baker & Taylor's purchasing requirements would be in this category. Materials in this category may be of any binding. These titles will receive no discount and are subject to a service charge. An example within this category would be: Business Income Coverage Guide, ISBN: 9781941627532.
- XII. **Spoken Word Audio (H)**
Materials designed for the general consumer, usually dealing with a subject matter having broad mass appeal. These titles can be either fiction or current non-fiction. An example of a spoken word audio edition would be: The Complete Sherlock Holmes by Sir Arthur Conan Doyle, ISBN: 9781491542286.
- XIII. **Board Books (I)**
Durable materials from widely distributed domestic publishers designed for young children; pages are manufactured of heavy gauge cardboard to prevent tearing. These editions typically feature few pages, simple themes and colorful illustrations or photographs. An example of a board book would be: Runaway Bunny by Margaret Wise Brown, ISBN: 9780061074295.
- XIV. **Novelty Items/Activity Books (I)**
Specially packaged gift set or novelty item related to a book product or attached as an accessory to a book product. These items would include a book with toy, rag books, washable cloth books, books with accessories or kits, electronic sound books, sticker books, tracing books or coloring books. This category also includes any non-book merchandise such as model kits, hobby kits, flash cards or jigsaw puzzles. An example of an item in this category would be: Very Hungry Caterpillar Cookbook & Cookie Cutters Kit by Lara Starr, ISBN 9781452125527.
- XV. **Special Programs (D and E as indicated in Exhibit 1)**
Programs, formats, or editions offered only by Baker & Taylor or not included in any other category. These programs include but may not be limited to PawPrint and Turtleback editions. Examples of items in this category would be: Clifford's Valentines Day by Norman Bridwell, ISBN 9781435201736 and Junie B. Jones is Captain Field Day by Barbara Park, ISBN 9780613337670.
- XVI. **DVD (9)**
Materials designed for the general consumer, often having broad mass appeal. Producers of these materials provide the products with standard supplier discount and with no supplier restrictions.
- XVII. **Music CD (2)**
Materials designed for the general consumer, often having broad mass appeal. Producers of these materials provide the products with standard supplier discount and with no supplier restrictions.

Exhibit 3

Exhibit 4



Institutional Returns Policy
(Revised July 2015)

The following guidelines are required to ensure prompt handling of your return. All product returns (**excluding Book Leasing programs**) require prior authorization from a Customer Service Representative. ***You may contact your appropriate representative via the toll-free number listed on your packing list.***

How to Obtain Return Authorization

Please use the Return Authorization Form from your shipment's packing list to make all returns. Contact your Customer Service Representative for return authorization. ***All claims must be made within 45 days from the date of invoice.***

1. When calling for return authorization, please have the following information available:
 - A. Return Authorization Form
 - B. Your account number and ATS# from the shipment's packing list (located mid-page under the Return Authorization Form explanation)
 - C. Reason for the claim/return
 - D. Action being requested -
 1. Replacement of product
 2. Credit to your account; no replacement product necessary
2. Your Customer Service Representative will assign your return an authorization number (RTA#). To expedite the process, please clearly mark the RTA# on the Return Authorization Form and on the outside of the carton in the upper right corner from the shipping label.
3. Make your return via an insured and traceable carrier; Baker & Taylor is not liable for returns lost in transit.
4. ***Products incorrectly shipped by Baker & Taylor may be returned with authorization within 45 days of the product's date of invoice.*** Product(s) meeting the definition of Publisher defective may be returned with prior authorization within six months of the product's date of invoice. Products purchased with value-added processing services which have been shipped as ordered are considered non-returnable.

DAMAGED SHIPMENTS: If you receive a damaged carton(s) which resulted in damaged product(s), please hold the product(s) and save the carton for Carrier inspection. If the damage is visible at the time of delivery, bring it to the Carrier's attention and note it on the Bill of Lading. Then, contact your Baker & Taylor Customer Service Representative via the toll-free number listed on the packing list.

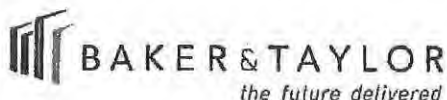
CLAIMING SHORTAGES: Please check your packing list or invoice before claiming shortages. ***All claims must be made within 45 days from the product's invoice date.*** Please ensure you have received all cartons of a shipment prior to signing for receipt from the Carrier. Cartons you have signed for as received from the Carrier are not claimable as shortages from Baker & Taylor.

INTERNATIONAL CUSTOMERS ONLY: For information on making returns of damaged, defective, or incorrect products, please contact your local International Sales Office or our International Customer Service Department (internationallibrarycustomerservice@baker-taylor.com). You may also refer to the website http://www.btol.com/international/libraries/details.cfm?sideMenu=Contact%20Us&home=home_help_details.cfm&ctx=1

All returns should be sent to:

Baker & Taylor Returns Center
Department R
251 Mt. Olive Church Road
Commerce, GA 30599

1 of 3 (continued on the next page)



Continuation Services Return Policy

STANDING-ORDER CANCELLATION AND RETURN POLICY

Baker & Taylor Continuation Services is a customized standing-order program designed for public, academic and school libraries. Customers may sign up for series on a standing-order basis, and will automatically receive every publication as they become available from publishers. Due to the nature of this program, only the exact amount of required books is ordered from each publisher on behalf of profiled customers. It is therefore necessary to adhere to a firm cancellation/return policy.

CANCELLATION POLICY

The customer must notify Continuation Services at 800-775-3600 at least 30 DAYS PRIOR TO PUBLICATION DATE to request the cancellation of a title or the deletion of a series from their profile.

To keep customers informed of their backordered titles, Continuation Services shipments include a Backorder Status Report. This report lists titles which a customer can expect to receive within the next three months. NOTE: Backorder Status Reports should be reviewed immediately upon receipt of shipment. Also, Master Profile Reports, a listing of all series on a customer's standing-order profile, are available upon request. Registered users may also view/maintain their standing order profiles and backordered titles via <http://compass.btl.com>.

RETURN POLICY

The following guidelines are required to ensure prompt handling of your return. All Continuation Services product returns require authorization from your Continuation Services Customer Account Representative in Bridgewater, New Jersey.

- Products incorrectly shipped by Baker & Taylor may be returned with authorization within 45 days of the product's date of invoice.
- Product(s) meeting the definition of Publisher defective may be returned with prior authorization within six months of the product's date of invoice.
- Products purchased with value-added processing services, which have been shipped as ordered or properly stamped by your library, are considered non-returnable.
- A title, which is ordered and received through Baker & Taylor Continuation Services, cannot be returned if a duplicate is received from another source. These books should be returned to the other supplier.

HOW TO OBTAIN RETURN AUTHORIZATION

Please use the Return Authorization Form from your shipment's packing list to make all returns. Contact your Continuation Services Customer Account Representative at 800-775-3600 for return authorization. All claims for damages and shortages must be made within 45 days from the date of invoice.

1. When calling for return authorization, please have the following information available:
 - a. Return Authorization Form – attached to the carton packing list
 - b. Your Continuation Services "C" account number, invoice and/or ATS# from the shipment's packing list
 - c. Reason for claim/return
 - d. Action being requested:
 - i. Replacement of product
 - ii. Credit to your account; no replacement product necessary
2. Your Customer Account Representative will assign your return an authorization number (RTA#). To expedite the process, please clearly mark the RTA number on the Return Authorization Form and on the outside of the carton in the upper right corner of the shipping label. Ship returns to: Baker & Taylor; Attn: Dept. R; Commerce Service Center; 251 Mt. Olive Church Road; Commerce, GA 30599-1100.
3. Make your return via an insured and traceable carrier; Baker & Taylor is not liable for returns lost in transit.

DAMAGED SHIPMENTS

If you receive a damaged carton(s), which resulted in a damaged product(s), please hold the product(s) and save the carton for carrier inspection. If the damage is visible at the time of delivery, bring it to the carrier's attention and note it on the Bill of Lading. Then, contact your Baker & Taylor Continuation Services Customer Account Representative via the toll-free number listed below.

CLAIMING SHORTAGES

Please check your packing list or invoice before claiming shortages. All shortage claims must be made within 45 days from the product's invoice date. Please ensure you have received all cartons of a shipment prior to signing for receipt from the carrier. Cartons you have signed for as received from the carrier are not claimable as shortages from Baker & Taylor.

Library & Education Account Audio/Video Product Returns Policy

The following guidelines are required to ensure the prompt handling of your Audio / Video (AV) returns; Music CD, DVD and Blu-ray product. All AV product returns (excluding DVD lease return product - please contact AV Customer Service for separate return procedures for your DVD Lease program product) require prior return authorization from an AV Customer Service Representative. **Please contact your AV Customer Service Rep at 800-775-1700.**

How to Obtain Return Authorization

Contact your AV Customer Service Representative for return authorization numbers. **All claims must be made within 45 days of invoice date.**

1. When calling for return authorization, please have the following information available:
 - A. Your account number and invoice #s
 - B. Reason for the claim/return
 - C. Action being requested -
 1. Replacement of product (defective return will receive a replacement of the same title)
 2. Credit to your account; no replacement product necessary for mis-ships
 3. Overstock return credit requires Customer Service Mgr and Sales Mgr approval
2. Your AV Customer Service Representative will assign your return an authorization number (RA#). To expedite the process, please clearly mark the RA# on the outside of the carton in the upper right corner from the shipping label and on inserted documents.
3. Ship your return via an insured and traceable carrier; Baker & Taylor is not liable for returns lost in transit.
4. **Products incorrectly shipped by Baker & Taylor require an authorization to be returned. Product should be returned within seven days of invoice date; must be returned within 45 days of the product's invoice date.** Product(s) meeting the definition of a Manufacturer's defective may be returned with a prior authorization. Products purchased with value-added processing services which have been shipped as ordered are considered non-returnable, unless disc is defective. In this case, a replacement of same title will be sent (multi disc sets require all discs to be returned).

DAMAGED SHIPMENTS: If you receive a damaged carton(s) which resulted in damaged Audio/Video product(s), please hold the product(s) and save the carton for Carrier inspection. If the damage is visible at the time of delivery, bring it to the Carrier's attention and note it on the Bill of Lading. Then, contact your Baker & Taylor AV Customer Service Rep via the toll-free number above.

CLAIMING SHORTAGES: Please check your packing list or invoice before claiming shortages. **All claims must be made within 15 days from the product's invoice date.** Please ensure you have received all cartons of a shipment prior to signing for receipt from the Carrier. Cartons you have signed for as received from the Carrier are not claimable as shortages from Baker & Taylor.

All returns with RA# should be sent promptly to:

**Baker & Taylor Returns Center
Dept. R
251 Mt. Olive Church Road
Commerce, GA 30599**

Questions? Contact your B&T
AV Customer Service Rep (800.775-1700)

Email via AVInfo@Baker-Taylor.com or
LibraryAV/customerservice@baker-taylor.com

Exhibit 5

TOLL-FREE NUMBERS AND ADDRESSES OF BAKER & TAYLOR CONTACTS**For Placing Orders****Firm Orders (Print Book/Spoken Word)****Axis 360 E-Content**

Baker & Taylor
 Attn: Ordering Department
 Commerce Service Center
 3584 Old Maysville Rd
 Commerce, GA 30529
 Toll-Free Phone 800-775-1100
 Toll-Free Fax 800-775-7480
 Email: orders@baker-taylor.com

Gale E-Book Services

Ms. Jennifer Russo
 Support Center Representative
 Baker & Taylor
 501 Route 22
 Bridgewater, NJ 08807
 (800) 775-3600 x7288
 Email: Jennifer.Russo@baker-taylor.com

Continuation Service Materials

Baker & Taylor
 Attn: Continuation Services
 501 US Route 22
 Bridgewater, NJ 08807-0885
 Toll-Free Telephone (800) 775-3600
 Toll-Free Fax (800) 775-1600
 Email: btcontinuations@baker-taylor.com

DVD/Blu-ray/Music CD

Baker & Taylor
 Attn: Library Services
 2810 Coliseum Centre Drive-Ste. 300
 Charlotte, NC 28217

Toll-Free Phone: See Account Support below
 Toll-Free Fax: 888-285-8922
 Email: See Account Support below

Customer Service / Account Support**Book and Spoken Word****Toll Free Telephone: 800-775-1200**

AL - Sandra Whitfield ext. 2770 / Sandra.Whitfield@baker-taylor.com
 FL - Cretia Fitzpatrick ext. 2264 / Cretia.Fitzpatrick@baker-taylor.com
 KY - Kim Waldrop ext. 2764 / Kim.Waldrop@baker-taylor.com
 NC - Carol LeMasters ext. 2212 / Carol.LeMasters@baker-taylor.com
 TN - Andrea Turner ext. 2281 / Andrea.Turner@baker-taylor.com
 VA - Lee Ann Turner ext. 2783 / Email: leeann.turner@baker-taylor.com
 WV - Carol LeMasters ext. 2212 / Carol.LeMasters@baker-taylor.com

DVDs/Blu-ray/Music CDs**Toll Free Telephone: 800-775-2600**

AL - Dan Metro ext. 2097 / Dan.Metro@baker-taylor.com
 FL - Christina Watson ext. 2046 / Christina.Watson@baker-taylor.com
 KY - Heidi Metro ext. 2135 / Heidi.Metro@baker-taylor.com
 NC - Jackie Stocker ext. 2162 / Jackie.Stocker@baker-taylor.com
 TN - Dan Metro ext. 2097 / Dan.Metro@baker-taylor.com
 VA - Heidi Metro ext. 2135 / Heidi.Metro@baker-taylor.com
 WV - Jackie Stocker ext. 2162 / Jackie.Stocker@baker-taylor.com

Continuation Service

Ms. Cynthia Hoffman
 Continuation Service Account Representative
 (800) 775-3600 x7287
 Email: cynthia.hoffman@baker-taylor.com

Sales Consultant**800-775-7930**

AL - Leah Sealy ext. 1350 / Leah.Sealy@baker-taylor.com
 FL - Fred Harvey ext. 1410 / Fred.Harvey@baker-taylor.com
 KY - Leah Sealy ext. 1350 / Leah.Sealy@baker-taylor.com
 NC - Jon Jezorski ext. 1230 / Jon.Jezorski@baker-taylor.com
 TN - Leah Sealy ext. 1350 / Leah.Sealy@baker-taylor.com
 VA - Jon Jezorski ext. 1230 / Jon.Jezorski@baker-taylor.com
 WV - Jon Jezorski ext. 1230 / Jon.Jezorski@baker-taylor.com

REMIT ADDRESS (Lockbox)

Baker & Taylor
 PO Box 277930
 Atlanta, GA 30384-7930

CUSTOMER FINANCIAL SERVICES:

Baker & Taylor
 2810 Coliseum Centre Drive; Suite 300
 Charlotte, NC 28217
 Phone: 800-340-5370
 Accts. Receivable Fax: 704-998-3314
 Email: dl-arsupport@baker-taylor.com

Exhibit 6



Sample Book Invoice with Processing Charges

INVOICE

INVOICE # 5000815498
INVOICE DATE 05/11/16
ACCOUNT # XXXXXX LKXXXXX 3 000000
ATS # COM0000000
PAGE 001

SHIPPED FROM
CUSTOMER SERVICE
CREDIT

COMMERCE
1-800-775-1200
800.340.5370/INTL 704.998.3399

GST/TAX ID #
PO #

00-00000000000000
SAMPLE

BILL ACCOUNT # XXXXXX LKXXXXX 3 000000
SAN # XXX
NAME: SAMPLE
ADDRESS XXX XXXXXXXX XXXXXXXX
XXXXXXXX, XX XXXXX

SHIP ACCOUNT # XXXXXX LKXXXXX 3 000000
SAN # XXX
NAME: SAMPLE
ADDRESS XXX XXXXXXXX XXXXXXXX
XXXXXXXX, XX XXXXX

ALL CLAIMS MUST BE MADE WITHIN 45 DAYS OF INVOICE. RETURN AUTHORIZATION REQUIRED. NOT RESPONSIBLE FOR GOODS SENT UNINSURED.

SHIPMENT FOR ORDER 00000001										
QTY	TITLE		AUTHOR	TYPE	ISBN	PUB	PRICE	DISC.	NET PRICE	EXTENDED PRICE
	BT ORDER #	CUSTOMER PO #	FUND #	CUST REF #	ISBN-10					
1	ALTER EGOS 00000001	SAMPLE1	LANDLER, MARK 111111	HRD	9780812998856 0812998855	RANDO	XX.XX	XX.X%	XX.XX	XX.XX
1	LOST AND GONE FOREVER 00000001	SAMPLE1	GRECIAN, ALEX 111111	HRD	9780399176104 0399176101	PENGU	XX.XX	XX.X%	XX.XX	XX.XX
1	MATHEWS MEN 00000001	SAMPLE1	GEROUX, WILLIAM 111111	HRD	9780525428152 0525428151	PENGU	XX.XX	XX.X%	XX.XX	XX.XX
3	PAGE TOTAL									XX.XX
SUB TOTAL										XX.XX
USD CURRENCY										
3	MYLAR JACKET STANDAR	AT	X.XX	=	X.XX	VAS				X.XX

CITY TAX 0.00
COUNTY TAX 0.00
STATE TAX 0.00
TOTAL

TERMS : 00 NET 30 DAYS
AMOUNTS BILLED IN USD

TOTAL AMOUNT DUE XX.XX
REMIT TO: BAKER & TAYLOR
P.O. BOX 277930
ATLANTA, GA 30384-7930
NEW REMITTANCE ADDRESS
PLEASE INDICATE INVOICE # ON YOUR REMITTANCE

Institutional: Invoice & Status Codes

Refer to the list below for definitions to codes found on Baker & Taylor Invoices, status reports, electronic search, and electronic ordering confirmations.

CODE	DESCRIPTION
AD	Canceled; please order directly from publisher.
AH	Available in hardcover only; please reorder, if desired.
AP	Available in paperback only; please reorder, if desired.
BP	Balance of order line backordered.
CA	Cataloging not provided; charge removed.
CAS	Spoken Word Audio Cassette / Book on Tape
CB	Balanced Canc-Pub Restricted
CD	Music Compact Disc
CDL	Compact Laser Disc
CE	Balance of order line canceled.
CF	Canceled; newer edition due at a later date; please reorder, if desired
CG	Canceled; title must be imported for U.S. distribution
CMD	Spoken Word Audio CD-Rom / Book on CD
CN	Export not allowed to be sold to a USA customer
CP	Canceled; current price is much higher than noted on your order. Please reorder noting correct price, if desired.
CR	Canceled; customer requested cancellation.
CST	Music Cassette
CT	Canceled; publisher/producer failed to respond to your cancellation date. Please reorder, if desired, allowing a minimum backorder period of 60 days.
CV	Canceled; sold as volume set only; please reorder, if desired.
DL	Canceled; customer requested discount limit exceeded.
DVD	Digital Versatile Disc
EX	Canceled; exceeds "do-not-exceed limit."
HRD	Hardcover
IN	Canceled; cannot identify as ordered; please reorder supplying exact title, author, ISBN, volume, number, edition/year, publisher, name and address.
KS	Canceled; book sold by subscription only.
LIB	Publisher Library Edition
MJ	Mylar jacket charge removed.
NC	Not available cataloged.
NP	Not yet published; canceled or backordered according to customer instructions.
*NR	Title is non-returnable.
OB	Canceled; publisher out of business.
OP	Canceled; out of print.
OS	Publisher and B&T are out of stock; publisher has not supplied a new shipping date.
PAP	Paperback
PB	PB Book sent to bindery to receive customer-requested binding; book will be shipped upon receipt from bindery.
PBD	Reinforced Binding
PC	Canceled; publisher canceled publication.
PS	Canceled; publisher has not declared OP, but has no specific plans to reprint.
SAL	Juvenile Reinforced Edition / School & Library Binding
SI	Canceled; sold as individual items only; please reorder, if desired.
SU	Canceled; customer requested cancellation of surcharged titles.
TBK	Turtleback - Reinforced Binding
TH	Theft detection not provided; charge removed.
TXT	Text Hardcover
UL	Canceled; unable to locate publisher through research.
VA	Other value-added service items not provided; charge removed.
VHS	Video
VS	Multiple value-added service items not provided; charge removed.
WR	Not yet published; canceled or backordered according to customer instructions.



LIBRARY OF VIRGINIA

Sandra Gioia Treadway
Librarian of Virginia

Q& A for RFP: LVA-MAT-22-007

Q: Do we need to register with MALiA first before we submit a bid?

A: No, vendors do not register with MALiA, just in eVA

Q: Is the membership fee of \$150.00 a one-time fee or is it required every year?

A: The \$150 MALiA membership fee is every year, but just for libraries that want to join MALiA, not for vendors.

Q: Is processing, cataloging and MARC Records a requirement for this RFP?

A: No, processing, cataloging, and MARC records are not required.

Q: Could you please provide clarification to "MARC Record Standard" and "MARC Record Custom" indicated on page 34 of 54?

A: The MARC (Machine Readable Cataloging) standard is the standard format for bibliographic records. More info about MARC is available at <http://www.loc.gov/marc/> and at https://en.wikipedia.org/wiki/MARC_standards.

A custom MARC record is a standard MARC record that has been customized according to the needs of a particular library.

Q: Will you accept bid responses for K-12 Schools (private, or public) and early education learning centers only?

A: MALiA membership is made up of public, academic, school (K-12), and special libraries. Vendors that wish to supply any (one or more) of these library types/audiences are welcome to submit an RFP response. Vendors should clearly indicate if their RFP responses and discounts terms apply just to certain types of libraries.

Q: Are we to enter our responses only within the Attachment B or can we reference any additional Attachments to further explain our response?

800 East Broad Street
Richmond, Virginia 23219

www.loc.gov

804 692 3500 phone
804 692 3976 fax

- A: Please refer to attachments B which provides instructions on filling out this form. Attachment C should be filled out if providing discounts - instructions included on attachment.
- Q: Is MALiA membership open to any library in any State?
- A: Yes
- Q: Does MALiA anticipate the award of multiple contracts (vendor pool)?
- A: Yes
- Q: Will there be any limit to the number of vendors selected for award?
- A: No
- Q: Are vendors required to bid on all categories / materials?
- A: No
- Q: Are vendors required to provide a catalog within eVA?
- A: Please refer to the term as it is written
- Q: Will member libraries be required to place orders via eVA, or may they place orders via their own ILS?
- A: This applies to those locations that are required by code to use eVA.
- Q: Will the provision of a link to the vendor website meet this requirement?
- A: Yes
- Q: Item J Payment, discusses payment within 30 days. Page 28, item 7, discusses net 60 day payment terms. Are there specific payment term requirements associated with the agreement?
- A: An addendum will be issued to change Page 28, item #7.
- Q: Please define Special Edition Binding.
- A: Binding options that vendors may provide for a special edition work that differs from a regular edition by some distinctive or added feature (e.g. introduction, notes, appendix, and illustrations).
- Q: Is Current/Popular hardcover or paperback material?
- A: It can be either or both.
- Q: Can the vendor offer separate discounts for hardcover versus paperback materials?

A: Yes

Q: Regarding Large Print and Graphic Novels, may the vendor offer a separate discount for hardcover versus paperback materials?

A: Yes

Q: May the vendor bid a range of discount on the various Types of material?

A: Yes

Q: Please define MARC record Custom?

A: A standard MARC record that has been customized according to the needs of a particular library.

Q: May vendors offer separate cataloging/processing prices for each year of the agreement?

A: No

Q: May a vendor bid a range of discount for these categories?

A: Yes

Q: Small Business Subcontracting - If no subcontractors will be used, is any further action required for this form?

A: You will need to fill out the top portion of the form, sign and check the box that says I plan to complete all work.

Q: Is Small Business Subcontracting required in order to receive an award?

A: No



LIBRARY OF VIRGINIA

Sandra Gioia Treadway
Librarian of Virginia

ADDENDUM NO. 1 TO ALL BIDDERS

Reference: Request for Proposal: LVA-MAT-22-007

71510 – Books, Curriculum Guides, Directories, Magazines, Pamphlets, Periodicals, Publications, Reprints, etc.
71512 – Books, Reference (incl. CD versions) Dictionaries, Encyclopedias, etc.
71535 – Electronic Publications: Directories, Dictionaries, Encyclopedia, etc.
71505 – Audio Cassettes, Tapes and Compact Disks (prerecorded)
71590 – Video Cassettes, Disks, Tapes, etc. (For Computer and TV, Prerecorded)

Date: February 1, 2022

The above proposal is hereby changed to read or clarified by the following:

Reference, Attachment B: Service requirements Deemed Important in Consideration of Contractor Selections - Section III. Invoices and payment #7 change:

7. The vendor is able to accommodate Net 60 payment terms without imposing an extra charge.

☐ Yes

☐ No

Remarks:

To read:

7. Is a penalty imposed for late payment of an invoice? If yes, indicate the time period and amount of the penalty.

Remarks:

Library of Virginia
Purchasing Office
800 East Broad Street
Richmond, Virginia 23219

Offeror's Name:
Offeror's Address:

Buyer: Nancy Sconzo
RFP #: LVA-MAT-22-007
RFP Due Date: March 3, 2022

Sincerely,
Nancy Sconzo

Nancy Sconzo

Baker + Taylor
Name of Firm
Ellen Green Director Pricing Services
Signature/Title
3-1-2022
Date

MUST BE RETURNED WITH YOUR PROPOSAL

Exhibit 7

**Save your staff
valuable time.**

**Enjoy easier selection and
ordering processes.**

BAKER & TAYLOR'S
**COLLECTION
DEVELOPMENT
SERVICES**

*print, digital
and A/V content*

COLLECTION DEVELOPMENT SERVICES

for print, digital and A/V content

Baker & Taylor offers libraries an extensive range of collection development services. These services are all tailored to meet your library's unique requirements. We offer a variety of free and fee-based services and programs — all designed to assure cost-effective, quality collection building and efficiencies within the library.

Baker & Taylor's collection development services include automatic shipment programs, notification programs and evidence-based decision support for both print and digital content.

Baker & Taylor is your one trusted source for books, ebooks, digital audiobooks, music and movies.

Automatic Shipment Programs

Automatically Yours | PAGES 4-5

A free, specialized program that allows your library to customize its collection with the latest print and digital titles — by popular authors or in a highly-circulated series — delivered right to your door, automatically.

Parade | PAGE 6

Standing order programs of popular titles, pre-selected by Baker & Taylor's Collection Development librarians to help reduce the time, effort and expense of ordering.

Continuations | PAGE 6

Your one-stop source to customize your collection of ongoing series standing orders for print and digital content, in a variety of available genres.

Notification Programs

FirstLook | PAGES 8-10

The family of notification services available to libraries for print and digital content.

Selection Lists | PAGE 10

Collection of forthcoming, topical and popular lists available in Title Source™ 3 / Title Source 360.

Evidence-based Decision Support

Evidence-based Selection Planning (ESP) | PAGE 11

Brings the art of Baker & Taylor's collection development expertise together with the science of collectionHQ's data analytics to create a decision support system integrated with Title Source 360 to equip your library with the information to select the right titles and quantities, for the right locations.

Automatically Yours

Automatically Yours™ is a specialized program that allows you to have the latest print, digital and A/V titles — by popular authors or in a series — delivered right to your door, automatically. We send you the latest titles as soon as they are released. No more placing separate orders or worrying about title availability. The titles will arrive on time at your library, every time.

Automatically Yours offers the following plans:

ADULT

Popular Adult Fiction	Choose from more than 1,100 authors
Large Print Popular Adult Fiction	Choose from more than 1,000 authors
Inspirational Authors	Choose from more than 250 adult authors
Spoken Word Audio	Choose from more than 1,000 authors in abridged or unabridged (when available) formats on CD
Graphic Novels Series	Choose from more than 180 series
Book Club Plans	Includes all major national book clubs
Popular Nonfiction	Choose from more than 100 authors

Automatically Yours Plans include:

+ Order confirmation reports sent monthly for forthcoming title additions

+ Popular authors, series, formats and award selections updated annually

+ Cataloging and processing available upon request

CHILDREN'S AND TEEN SERVICES (CATS)

CATS Authors and Illustrators	Choose from more than 850 authors and illustrators
CATS Awards	Choose from more than 80 professionally selected and international children's and teen awards
CATS Series	More than 3,500 series are available in various bindings
CATS Graphic Novels Series	Choose from more than 540 series

Automatic Shipment Programs

A/V *Receive all the newest movie, TV and video releases in time to satisfy patron demand*

Adult & TV Standing Order	Choose from a wide variety of series on DVD
CATS Standing Order	Choose from an unlimited selection of popular TV and video series on DVD
Box Office Hits Standing Order	Choose from a broad assortment of top theatrical video titles



+ Titles shipped automatically upon receipt from the publisher/studio

+ Free collection development support with detailed analyses and reports

+ **NEW TO TITLE SOURCE 360:** Titles flagged as “On Order” with “Duplicate Check” feature

DIGITAL *Titles available through our Axis 360 digital media circulation platform**

Popular Adult Fiction	Choose from more than 150 authors
Popular Nonfiction Series	Choose from more than 200 series
CATS Series	Choose from more than 150 series
Digital Spoken Word	Choose from more than 100 popular authors

**New authors and series added weekly*

Parade

The Parade standing order programs from Baker & Taylor help libraries reduce the time and expense of ordering and collection management. Our plans are developed by professional librarians and are continually updated to meet the current needs of your patrons. Once a year, simply select the plans you wish to receive — a one-time payment reduces invoices, and the most popular new materials are sent to you every month for 12 months.

PAPERBACK AND SPOKEN WORD AUDIO PARADE

With more than 25 plans to choose from, we can fill your needs for all popular titles ranging from mystery to romance to Spanish language, and more. Select spoken word audio plans are also available.

CATS PARADE

To meet all your children's and teen needs, we have 25 book plans to choose from, ranging from popular and easy-to-read titles for beginning readers, to children's fiction and graphic novels. In addition, there are two plans for popular spoken word audio titles.

MUSIC PARADE

To ensure your library has the hottest new titles in a timely fashion, we offer our exclusive music standing order program. The program offers 20 plans and covers the range of musical interests from adult contemporary to world music. Plans are designed to provide expertly chosen selections that best represent new releases within a genre.

MOVIE PARADE

Choose from 14 plans, including new releases and a wide range of genres, to suit all of your patrons' needs. Both DVD and Blu-ray formats are available.

Continuations

Continuations is your one-stop source for series standing orders for print and digital content. Our extensive title selection, innovative Web-based system, unparalleled service and free management reports make us a leader in standing order services. Continuations offerings include travel books, almanacs, yearbooks, test preparation and occupational guides, as well as essential general reference. Also included are numbered and unnumbered monographic series, sets in progress, non-subscription serials, proceedings and select U.S. government documents and publications. Our experienced researchers monitor more than 40,000 adult and children's series from more than 14,000 publishers, so they know when the next issues of relevant publications will be published. We then ship the new titles as soon as they are available. Additionally, our friendly support staff provides analyses and extra assistance with your adult and children's series collection development plans.



FirstLook

FirstLook™ is the family of notification services available to libraries for print and digital content. FirstLook is supported by a staff of experienced librarians and merchandising specialists who are experts in the publishing and entertainment industries. These services are supported by the industry's most sophisticated collection development management system, and title lists are provided via Title Source 3 / Title Source 360.

FIRSTLOOK BASIC

A free collection development program that provides notification of high-visibility new and forthcoming titles, and also allows your library to create separate profiles by subject category. FirstLook Basic is available to subscribers of Title Source 3 / Title Source 360.

FirstLook Basic allows you to create separate profiles by subject category. The key criteria in title identification for these categories is the prepublication purchasing threshold, which represents our anticipated demand for these titles. Lists are sent as Title Source 3 / Title Source 360 carts during the last week of every month, 90 to 120 days in advance of the anticipated date of publication. This program is supported by the most experienced merchandising team in the industry.

FirstLook Basic addresses all collection areas, including those typically not covered in review journals. There are different thresholds for different categories. Category coverage includes adult fiction genres, nonfiction categories and children's and teen areas. Additional plans cover spoken word audio, music and movies. *Examples include, but are not limited to:*

Books

- ✚ Adult Fiction
- ✚ Adult Nonfiction
- ✚ Adult Spoken Word Audio
- ✚ Adult Graphic Novels
- ✚ Teen Fiction
- ✚ Teen Nonfiction
- ✚ Teen Spoken Word Audio
- ✚ Teen Graphic Novels
- ✚ Children's Fiction
- ✚ Children's Spoken Word Audio
- ✚ Children's Graphic Novels
- ✚ Children's Board Books
- ✚ Children's Picture Books and Easy Readers

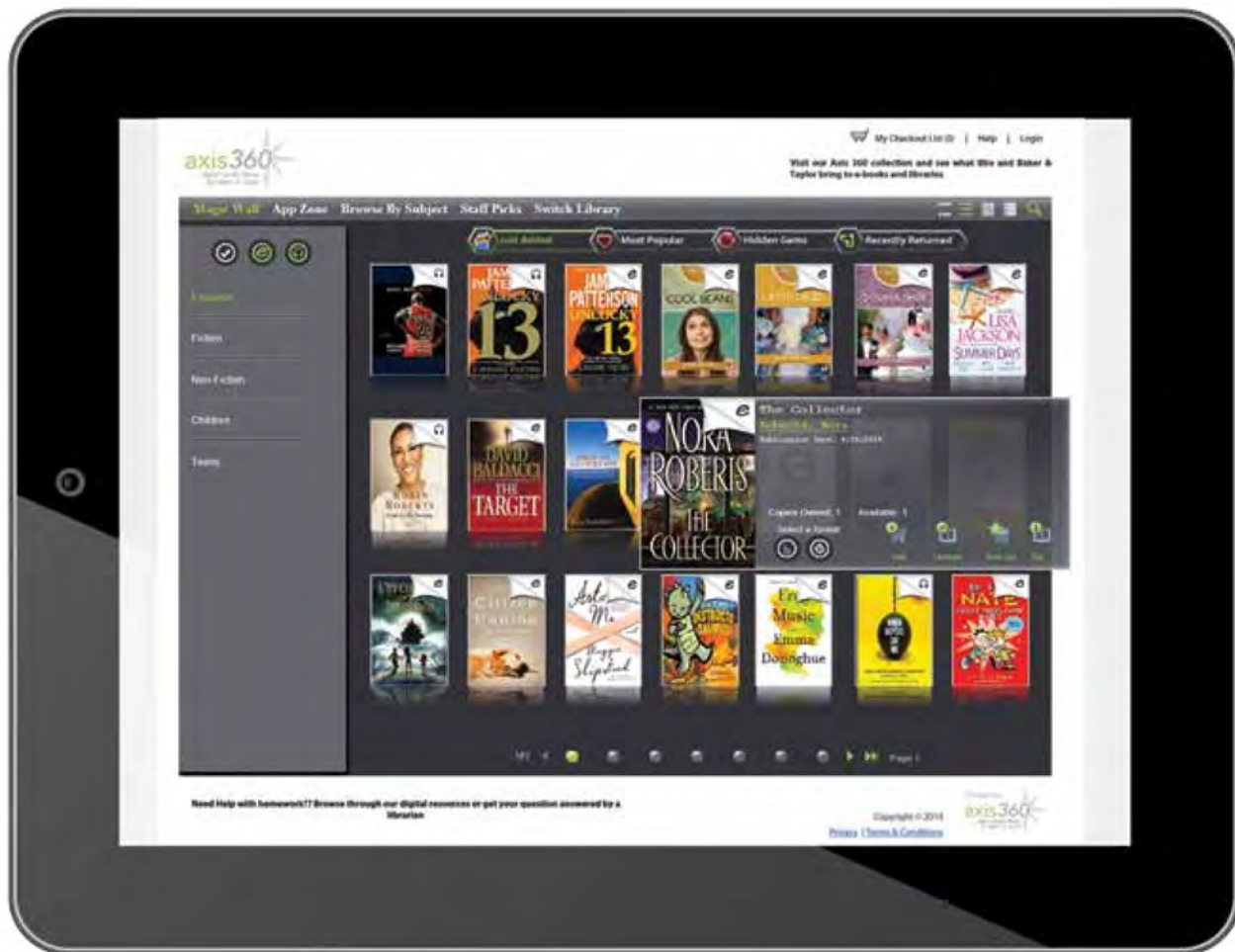


Music

- ✚ Pop and Rock
- ✚ Classical, Jazz, Soundtracks, Dance
- ✚ Country and Folk
- ✚ R&B and Rap/Hip Hop
- ✚ Children's

Movies

- ✚ Adult Feature
- ✚ Adult Nonfiction
- ✚ Adult TV
- ✚ Children's TV
- ✚ Children's / Family Feature



FIRSTLOOK DIGITAL

FirstLook Digital is a free program that notifies you every month about new and forthcoming digital titles. It helps you save time during the title selection process, allowing you to easily update your Axis 360 digital collection with the high-demand content your patrons are looking for.

✚ Monthly new title notification lists for all areas of interest at your library.

✚ Notification lists sent directly to each subject area selector's Title Source 3 / Title Source 360 User ID for easy review and ordering.

Just as you use Baker & Taylor's FirstLook for ordering physical products, these carts help make selecting Axis 360 digital content for your library fast and easy.

Monthly Notification Cart Options:

eBooks

- ✚ Adult Fiction
- ✚ Adult Nonfiction
- ✚ Teen Fiction
- ✚ Teen Nonfiction

- ✚ Children's E Class/ Picture Books
- ✚ Children's Fiction
- ✚ Children's Nonfiction

Acoustik™ Audiobooks

- ✚ Adult Fiction
- ✚ Adult Nonfiction
- ✚ Teen
- ✚ Children's

FIRSTLOOK CUSTOM

A fee-based subscription program that delivers customized selection carts for print and digital materials, based on your library's selection criteria. Delivery of these profiled carts via Title Source 3 / Title Source 360 makes your selection process easier and more efficient. You determine the profiles and carts you need, as well as a schedule for delivery. Simply create a profile with our collection management staff and we'll do the rest.

Our collection management group — consisting of more than 20 professionals with extensive knowledge of libraries — provides information and products that will exceed your expectations.



FirstLook Custom Features:

→ **MULTIPLE SELECTION CRITERIA INCLUDING, BUT NOT LIMITED TO:**

- ✦ Subject criteria, such as Dewey and LC classification
- ✦ BISAC and genre categories
- ✦ Full-text reviews and citations
- ✦ Audience level
- ✦ Series
- ✦ Publishers
- ✦ Citation in a Baker & Taylor publication or merchandising plan
- ✦ Publication date
- ✦ Format

→ **OUTPUT DELIVERED AS TITLE SOURCE 3 / TITLE SOURCE 360 CARTS**

→ **FLEXIBLE SCHEDULING OPTIONS**

- ✦ One-time special profiles (i.e. replacement lists) available
- ✦ Weekly, semi-monthly, quarterly, contingent upon profile/material type

→ **DUPLICATION MANAGEMENT**

- ✦ Titles are checked against previous carts — view a title one time for selection efficiency and to prevent unwanted duplication
- ✦ Carts can be compared to Baker & Taylor orders to prevent duplication

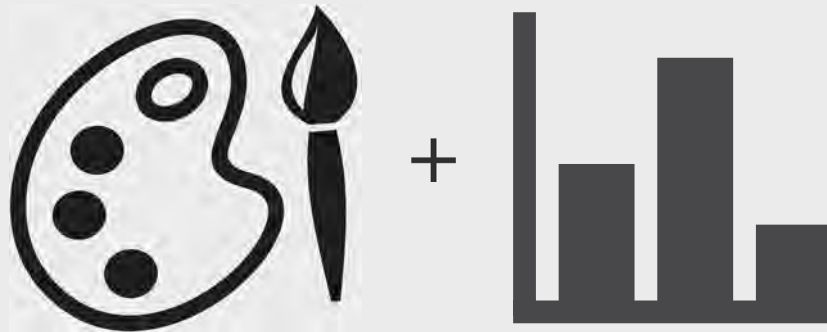
From high-visibility, low-selection intensity titles, to titles required for specialized and research collections, FirstLook Custom can facilitate effective title identification, selection and ordering.

Selection Lists

Many of your foreseeable and annual collection needs are supported with the various selection lists offered in Title Source 3 / Title Source 360. Whether it's to support a current topic, major holiday, summer reading or a popular genre, you will find a selection list that includes current and forthcoming titles for all of your patrons, from children to adults.

Evidence-based Selection Planning (ESP)

When resources are tight and spending collection dollars wisely is vital, libraries need a streamlined collection development process that ensures they have the titles they need, when and where they need them.



ESP — Evidence-based Selection Planning — brings the *art* of Baker & Taylor's collection development expertise together with the **SCIENCE** of collectionHQ's data analytics, to create a decision support system integrated with Title Source 360 to equip your library with the information to select the right titles and quantities, for the right locations.

ESP Decision Support System with Title Source 360:

- ✚ Integrates with FirstLook services and collection development workflows
- ✚ Identifies the top forthcoming titles based upon past circulation by author, subject and series
- ✚ Determines the locations where copies need to be placed to satisfy patron demand
- ✚ Monitors budgets through the use of collectionHQ spending plans



For more information on
Collection Development Services, please contact your Sales Consultant,
email btinfo@baker-taylor.com or call 800-775-1800.



www.baker-taylor.com



Exhibit 8

TechXpress Cataloging Specifications – *PRINT*

Contact Information

Baker and Taylor Account Number:	
Library Name:	
Library Address:	
City/State:	Zip Code:
Account Contact:	
Name:	Title:
Phone:	Fax:
Email:	
Date:	

Ordering Method

Library Automation System:		
How will you be submitting your orders?		
☐ Baker & Taylor's Online Ordering Site	☐ Fax	☐ Phone
☐ Electronic Transmission from my Automation System	☐ Mail	

If you need assistance completing this Specification Form, please feel free to contact your CREQ Representative: 1-800-775-7470 Ext. 5956

Unavailable Cataloging

There may be titles for which cataloging information is not yet available. In such cases:	
☐ SHIP title if cataloging is NOT available [N]	☐ CANCEL title if cataloging is NOT available [Y]

Book Coverings

☐ Yes	☐ No	Mylar Jackets		Baker & Taylor provides 1.5 mil Mylar Jacket on Hardback Books with Dust Jackets
		☐ All Hardcover Books with Dust Jackets (<i>Standard</i>) ☐ Only Cataloged Hardcover Books	☐ Glued ☐ Loose ☐ Taped	
☐ Yes	☐ No	Lamination		Baker & Taylor provides clear lamination to paperback books
		☐ ALL Paperbacks ☐ Only Mass Market Paperbacks ☐ Only Trade Paperbacks	Thickness: ☐ 10 mil ☐ 7 mil	

Spine Label

☐ Yes	☐ No	Baker and Taylor will provide you with a spine label that is a font size of Lucida Sans Typewriter; 12 Pitch Bold. Standard attachment is on dust cover or book if no dust cover, ½" from bottom book edge.
Please Indicate Your Desired Spine Label Location and Placement Below:		
Would you like a Clear Label Protector over Exposed Spine Label?		☐ Yes ☐ No
Please also complete the call number indications needed for your library in the section at the end of the form Labeled "Call Number-Classification Information" on page 6.		

Ownership Label

☐ Yes	☐ No	Baker and Taylor will provide you with an Ownership Label that can be up to 4 lines with 30 characters on each line. The capitalization can be in Upper and Lower case based on your indication below. Font Size is Tahoma; 8 pitch.
Please Indicate Below How Your Label Should Read: Line 1: _____ Line 2: _____ Line 3: _____ Line 4: _____		
Please Indicate Your Desired Ownership Label Location and Placement Below:		

Self Adhesive Date Due Slip

☐ Yes	☐ No	Date Due Slips are Self-Adhesive Across the Top Only.
☐ Baker & Taylor's Standard Attachment is Back Flyleaf, 1/2" from the Bottom Book Edge.		
If the Standard Location is not selected, Please Indicate Your Desired Location and Placement Below:		

Theft Detection

		Please indicate which type below:	
☐ Yes	☐ No	3M Sensitized/Desensitized (Tattletape)	
☐ Yes	☐ No	Checkpoint- select one <i>**A Half Pocket will be used to cover the Checkpoint Theft.</i>	☐ 310 series (8.2 MHZ frequency) ☐ 410 series (8.2 MHZ frequency) ☐ 320 series (9.5 MHZ frequency) ☐ 420 series (9.5 MHZ frequency)
Please Indicate Your Desired Checkpoint Location and Placement Below:			

RFID Theft

☐ Yes	☐ No	Baker & Taylor Universal RFID										
☐ Yes	☐ No	Customer Supplied RFID										
Please Indicate the RFID Vendor Device in your Library: <table border="0"> <tr> <td>☐ 3M</td> <td>☐ Checkpoint</td> <td>☐ ITG</td> <td>☐ FE Technology</td> <td>☐ Envision Ware</td> </tr> <tr> <td>☐ Bibliotheca</td> <td>☐ ISO 3M</td> <td>☐ LIBCON</td> <td>☐ Tech Logic</td> <td>☐ VTLS</td> </tr> </table>			☐ 3M	☐ Checkpoint	☐ ITG	☐ FE Technology	☐ Envision Ware	☐ Bibliotheca	☐ ISO 3M	☐ LIBCON	☐ Tech Logic	☐ VTLS
☐ 3M	☐ Checkpoint	☐ ITG	☐ FE Technology	☐ Envision Ware								
☐ Bibliotheca	☐ ISO 3M	☐ LIBCON	☐ Tech Logic	☐ VTLS								
RFID Label Type: ☐ Theft ☐ Theft with Cover ☐ Theft with Cover and Barcode												
Location and Placement: <i>Please mark if you prefer our standard placements.</i> ☐ Lower left corner of the Inside back cover, 1/3" to 3/4" from the spine. The position will be staggered starting with 1st position 1/4" from bottom book edge. 2nd position, 1 inch from the bottom edge. 3rd position, 2 inches from bottom book edge and 4th position, 3 inches from bottom book edge.												
<i>Note: If location/placement interferes with pertinent information such as maps, illustrations or photos, Baker & Taylor will apply unless provided with an alternative location.</i>												
If the Standard Placement is not selected, Please Indicate Your Desired Location and Placement Below:												
☐ Yes	☐ No	RFID Linkage										
Link to Barcode: ☐ Baker & Taylor ☐ Customer Supplied												
<i>Note: If you choose to link to a Customer Supplied Barcode & Receive MARC records, the Barcode Number will not appear in the MARC Record. If linking to a Baker & Taylor Barcode, the Barcode Number will appear in the MARC record.</i>												

Baker & Taylor Barcode Labels

Standard Barcode Label		Small Barcode Label		Eye Readable Barcode Label	
423 LIBRARY NAME (30 Characters) WEB 2nd Line (Max 30 Characters) Webster's thesaurus for students. 12345678901234		LIBRARY NAME (30 Characters) 12345678901234		12345678901234	
☐ Yes	☐ No	Baker & Taylor Barcode Labels			
		How many Barcode Labels? _____			
		☐ Yes ☐ No Should Clear Label Protector be applied over exposed Barcode Labels?			
		☐ Yes ☐ No Does the Barcode Include a Prefix?		Prefix: _____	
		☐ Yes ☐ No Is the Last Digit a Check Digit?			
How Many Digits (including check digit if noted above) are in the Total Length of the Barcode? _____					
BARCODE RANGE: Please provide a range of at least 1,000 numbers to use as the starting and ending numbers.			STARTING NUMBER: _____ ENDING NUMBER: _____		
Please indicate your Barcode Symbology:					
☐ Code 3/9 ☐ Codabar ☐ Circ Plus 2/5 ☐ Interleaved 2/5 (Code 1-2/5) ☐ Code 3/9 with Modulus 10 Check Digit ☐ Code 3/9 with Modulus 43 Check Digit ☐ Code IV (Winnebago LCSIII/Apple Software)					
Barcode Label Reading Indicate all caps or upper and lower case. Up to 2 lines of information can be indicated but not required. There is a 30 character limit per line including spacing.			Please indicate how the Barcode Label should read. Line 1: _____ Line 2: _____		
BACK COVER FRONT COVER INSIDE FRONT COVER INSIDE BACK COVER					
Barcode Label Location #1: _____ Additional Information:		Barcode Label Placement ☐ Horizontal ☐ Vertical-data reads top to bottom ☐ Vertical-data reads bottom to top ☐ Loose		Which Type of Barcode? ☐ Standard Barcode Label ☐ Small Barcode Label ☐ Eye Readable Barcode Label	
Barcode Label Location #2: _____ Additional Information:		Barcode Label Placement ☐ Horizontal ☐ Vertical-data reads top to bottom ☐ Vertical-data reads bottom to top ☐ Loose		Which Type of Barcode? ☐ Standard Barcode Label ☐ Small Barcode Label ☐ Eye Readable Barcode Label	

Customer Supplied Barcode Labels

☐ Yes	☐ No	Customer Supplied Barcode Labels	<i>NOTE: A Baker and Taylor Representative will instruct you on where to send your customer supplied items.</i>
Please indicate your desired Customer Supplied Barcode Label location and placement below by entering the location number from the book diagram.			
Barcode Label Location #1: _____ Additional Information:		Barcode Label Placement ☐ Horizontal ☐ Vertical-data reads top to bottom ☐ Vertical-data reads bottom to top ☐ Loose	
Barcode Label Location #2: _____ Additional Information:		Barcode Label Placement ☐ Horizontal ☐ Vertical-data reads top to bottom ☐ Vertical-data reads bottom to top ☐ Loose	

Customer Supplied Items

☐ Yes	☐ No	Customer Supplied Stamp
Please indicate your desired stamping color, location and placement for each stamping below:		
☐ Yes	☐ No	Customer Supplied Branch/Ownership Labels
Please indicate your desired location and placement for each below:		

Marc Records

☐ Yes	☐ No	Machine Readable Records will be provided on Internet through our Baker and Taylor Website for every order. Download instructions will be provided upon account setup. If you would like to see call numbers included in your marc records, please fill out the Classification Information Section at the end of the form.				
Subject Headings		Subject headings provided will be Library of Congress.				
LC Subject Headings Options		☐ LC and LC juvenile headings ☐ Only LC headings ☐ Only LC juvenile headings ☐ LC headings (without subdivision "Juvenile literature") and LC juvenile headings ☐ Only LC headings (without subdivision "Juvenile literature")				
Name of Automation System 		Please indicate Format – If unsure about selection, please contact your automated software vendor. ☐ USMARC Microlif – 852 Holdings Data –undivided call number ☐ USMARC Microlif – 852 Holdings Data –divided call number ☐ USMARC Microlif – _____ Holdings Data – Please indicate tag and subfield holdings under Item Holdings Information below				
Items/Holdings information Specify tag and subfield for data to be included in Item/Holding tag. If NO tag is specified, data will not appear in Baker and Taylor assigned tag as noted in Format above. If Additional Tag information is required, use additional information section on Page 7.						
List Price	Tag	Indicator 1	Indicator 2	Subfield		
Holding/Branch Code	Tag	Indicator 1	Indicator 2	Subfield		
Baker and Taylor Generated Barcode	Tag	Indicator 1	Indicator 2	Subfield		
Local Call Number (undivided)	Tag	Indicator 1	Indicator 2	Subfield		
Local Call Number (Divided)	Tag	Indicator 1	Indicator 2	Subfield Prefix	_____	
				Subfield Class	_____	
				Subfield Author Letters	_____	
				Subfield Suffix	_____	
Local Call Number	Tag	Indicator 1	Indicator 2	Subfield		
Order Date	Tag	Indicator 1	Indicator 2	Subfield		
Grade Level	Tag	Indicator 1	Indicator 2	Subfield		
Purchase Order	Tag	Indicator 1	Indicator 2	Subfield		
Review Sources	Tag	Indicator 1	Indicator 2	Subfield		

Call Number Classification Information

TechXpress spine labels include up to **8 characters per line**.

Please use **ABC....** To indicate author letters where all letters are capitalized. Only one choice per account.

Please use **Abc...** To indicate author/biographee letter where only first letter is capitalized. Only one choice per account.

Indicate Full Surname by writing SURNAME and indicate First Name by writing FIRST NAME. **If Full Surname or Full First name is required, the surname will wrap after the 8th character.**

Please complete each section with an entry following the "sample" fiction and nonfiction entries to provide us with the appearance you would like for your spine labels.

Sample Adult Fiction

Possible options: F, FIC, FICTION

Sample Adult Nonfiction

123, or 1234 denotes # places past decimal

FIC
Abcdefgh
A

FIC "classification"
(1st 8 characters of Surname)
(1st letter of 1st name)

123.1234
ABC
A

(Dewey # cut 4 digits past Decimal)
(first three letters of author surname - all CAPS)
(first letter of author 1st name)

ADULT FICTION	☐ Not Required
Line 1	
Line 2	
Line 3	
Line 4	

ADULT NON-FICTION	☐ Not Required
Line 1	
Line 2	
Line 3	
Line 4	

ADULT INDIVIDUAL BIOGRAPHY	☐ Not Required
Line 1	
Line 2	
Line 3	
Line 4	

ADULT COLLECTIVE BIOGRAPHY	☐ Not Required
Line 1	
Line 2	
Line 3	
Line 4	

ADULT STORY COLLECTION	☐ Not Required
Line 1	
Line 2	
Line 3	
Line 4	

LARGE PRINT FICTION	☐ Not Required
Line 1	
Line 2	
Line 3	
Line 4	

LARGE PRINT NON-FICTION	☐ Not Required
Line 1	
Line 2	
Line 3	
Line 4	

FANTASY	☐ Not Required
Line 1	
Line 2	
Line 3	
Line 4	

MYSTERY	☐ Not Required
Line 1	
Line 2	
Line 3	
Line 4	

ROMANCE	☐ Not Required
Line 1	
Line 2	
Line 3	
Line 4	

SCIENCE FICTION	☐ Not Required
Line 1	
Line 2	
Line 3	
Line 4	

WESTERN	☐ Not Required
Line 1	
Line 2	
Line 3	
Line 4	

FOREIGN LANGUAGE	☐ Not Required
Line 1	
Line 2	
Line 3	
Line 4	

ADULT GRAPHIC NOVEL	☐ Not Required
Line 1	
Line 2	
Line 3	
Line 4	

YOUNG ADULT FICTION	☐ Not Required
Line 1	
Line 2	
Line 3	
Line 4	

YOUNG ADULT NON-FICTION	☐ Not Required
Line 1	
Line 2	
Line 3	
Line 4	

JUVENILE Applies to titles that have been indicated as JUVENILE in the 008 Tag.

JUVENILE FICTION	☐ Not Required
Line 1	
Line 2	
Line 3	
Line 4	

JUVENILE NON-FICTION	☐ Not Required
Line 1	
Line 2	
Line 3	
Line 4	

JUVENILE GRAPHIC NOVEL	☐ Not Required
Line 1	
Line 2	
Line 3	
Line 4	

EASY generally applies to titles in a Preschool through 3rd Grade Reading Level.

PICTURE BOOK	
☐ Not Required	
Line 1	
Line 2	
Line 3	
Line 4	

BOARD BOOK	
☐ Not Required	
Line 1	
Line 2	
Line 3	
Line 4	

EASY FICTION	
☐ Not Required	
Line 1	
Line 2	
Line 3	
Line 4	

EASY NON-FICTION	
☐ Not Required	
Line 1	
Line 2	
Line 3	
Line 4	

Additional Information

If you feel that you need to communicate any additional information that was not included on the form please do so below:

DIGITAL MEDIA PROCESSING

A/V Spec Form

Please fill out, save to your computer, and return as an attachment to dmp@baker-taylor.com.

Customer Name: _____

This form is being filled out for:

☐ Both DVD and CD product ☐ DVD product only ☐ CD product only

Account Information

Ship To: _____ Bill To: _____

Contact Information

Name: _____
Address: _____
Phone: _____ E-mail: _____

Account Number

Ship To: _____ Bill To: _____

Barcode Placement

Barcode range and symbology must be completed in the B&T MARC Spec Booklet in order for barcodes to be embedded.

Library Logo

☐ YES, placement: _____
☐ NO

Logo should be sent in electronic format as a JPEG file, quality must be 300 dpi or better.

Banner

☐ YES, choose one:
☐ Top ☐ Bottom ☐ Both
☐ NO, if no banner, skip to next page

Size:

Top Banner: ☐ 1/2" ☐ 3/4" ☐ 1"

Note: 1" option only applicable for DVDs

Bottom Banner: ☐ 1/2" ☐ 3/4" ☐ 1"

Note: 1" option only applicable for DVDs

Color (white is standard): _____



www.baker-taylor.com | 800-775-2600

DIGITAL MEDIA PROCESSING

A/V Spec Form

Spine Label

☐ YES ☐ NO

Format:

Alignment: ☐ Left Justify ☐ Center

Font: Size: _____

Style: _____

Vertical (reading top to bottom):

Horizontal (reading top to bottom):

Example Label:

Spine Title (Note: option only applicable for CDs):

Display:

☐ YES, **content for spine of CD:** ☐ Title ☐ Manufacturer ☐ Item number
☐ NO

Note: All data on the spine reads top to bottom. Standard is for title, manufacturer and item number to appear.

Custom Stickers

♦ Please provide samples of all labels and if available, provide JPEG files.
♦ Please attach sample artwork.
♦ Please mail completed B&T Marc Spec Booklet.

DMP Standard Cases

☐ YES ☐ NO ☐ Other: Specify _____

Office Use Only:

TOLAS

SOP

DMP

EXETER: Has warehouse been contacted to add to Exeter? Customer cannot order until that has been completed.



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OCLC Cataloging PLUS B&T MARC™

Dewey Classification – DVD



OCLC Cataloging PLUS B&T MARC™
(Dewey Classification – DVD)

The specifications chosen in this form are to be used for the following account(s) and institutions (school or library):

Baker & Taylor Account #: _____

School/Library: _____

Address: _____

City, State, Zip: _____

Telephone: _____ Fax: _____

Email: _____

Account Options: ☐ **MARC AV** ☐ **DMP**

- ☐ Processing Only
- ☐ Processing & Spine Label
- ☐ Processing & Marc Records
- ☐ Processing & Spine Label & Marc Records
- ☐ Spine Label Only
- ☐ Marc Records Only
- ☐ Spine & Marc Records

MARC Record File

- ☐ Yes ☐ No

Records are provided with every Shipment. If No, skip to Classification to define spine label. If no spine label, barcode, or cataloging are needed go to Processing.

System Interface

Software Company: _____

Format

- B ☐ MARC21
- L ☐ MicroLIF '87 *call # 900\$a, barcode 903\$a, list price 901\$a*
- M ☐ MARC21 – 852 Holdings data - *call # 852\$h, barcode 852\$p, list price 852\$9*
- M ☐ MARC21 – 852 Holdings data- *call # prefix 852\$k, call #classification 852\$h, call # author letters 852\$i, barcode 852\$p, list price 852\$9*

Method of Download

- 415 ☐ Internet
- 420 ☐ 3.5" high density diskette

Computer Compatibility

- 440 ☐ IBM
- 443 ☐ Macintosh

OCLC Cataloging PLUS B&T MARC™ (Dewey Classification – DVD)

Optional Item/Holdings Information

Baker & Taylor can generate Item/Holdings information including bar code number in MARC records. Specify tag and subfield for data to be included in item/holding tag. If no tag is specified, data will appear in Baker & Taylor assigned tag.

☐ Price
Tag _____ Indicator 1 _____ Indicator 2 _____ Subfield _____

☐ Holding/Branch Code
Tag _____ Indicator 1 _____ Indicator 2 _____ Subfield _____

Holding code data (one per account – 15 characters max) _____

☐ Barcode
Tag _____ Indicator 1 _____ Indicator 2 _____ Subfield _____

☐ Local Call Number (undivided)
Tag _____ Indicator 1 _____ Indicator 2 _____ Subfield _____

☐ Local Call Number (divided)
Tag _____ Indicator 1 _____ Indicator 2 _____ Subfield(Prefix) _____
Subfield(Suffix) _____

☐ Order Date
Tag _____ Indicator 1 _____ Indicator 2 _____ Subfield _____

☐ Purchase Order No.
Tag _____ Indicator 1 _____ Indicator 2 _____ Subfield _____

☐ Collection Code
Tag _____ Indicator 1 _____ Indicator 2 _____ Subfield _____

Collection code data (one per account) _____

Classification

Classification

B ☐ Unabridged Dewey

DVD Prefix / Suffix

A ☐ Provide no special prefix

B ☐ V

D ☐ VID

E ☐ VIDEO

F ☐ DVD

G ☐ DISC

H ☐ VID DISC

I ☐ AV

K ☐ VD

J ☐ VR

Other prefix _____

Other suffix _____

Other prefix and other suffix are limited to 8 characters per line / 3 lines maximum. Spine label limit is 6 lines total.

Juvenile Prefix

A ☐ No Special Identification

B ☐ J above classification number

C ☐ J in front of classification number

D ☐ j in front of classification number

E ☐ JUV above classification number

F ☐ j above classification number

OCLC Cataloging PLUS B&T MARC™
(Dewey Classification – DVD)

Capitalization

A ☐ Capitalize first letter only

B ☐ Capitalize all letters

Call Number Format

Dewey Class

- 100 ☐ No class number
- 101 ☐ Unabridged Dewey cut at first prime
- 103 ☐ Complete Unabridged Dewey number
- 105 ☐ Unabridged Dewey cut _____ (max of 8) digits after the decimal

Dewey Line Breaks

- 101 ☐ Format each segment on a separate line
 - 102 ☐ Wrap number with 8 positions per line
 - 103 ☐ Provide logical breaks with segments that fit up to 8 positions per line
 - 104 ☐ Place first 3 digits and decimal on top line, then provide 8 positions per line
 - 105 ☐ Place first 3 digits, decimal, and _____ (max of 4) digits on top line, then provide 8 positions per line
 - 205 ☐ Format each line with _____ (max 8) positions per each line
-

Dewey Title Main Entry Letters

- 100 ☐ No main entry letters
- 101 ☐ First letter of artist surname/main entry
- 102 ☐ First 2 letters of artist surname/main entry
- 103 ☐ First 3 letters of artist surname/main entry
- 104 ☐ First word of main entry
- 105 ☐ First _____ letters of main entry (maximum 8 letters)
- 201 ☐ First letter of title
- 202 ☐ First 2 letters of title
- 203 ☐ First 3 letters of title
- 204 ☐ First word of title
- 205 ☐ First _____ letters of title (maximum 8 letters)

Dewey Pub/Copyright Date Suffix

When selected, date will appear on spine label and call number in MARC record

- ☐ No Date
 - P ☐ Publication Date - When there is no Publication date, Copyright will be used
 - C ☐ Copyright date - When there is no Copyright date, Publication date will be used
-

Biography

- A ☐ B
- B ☐ BIO
- C ☐ 92
- D ☐ 921
- F ☐ Dewey Number (as given in the 082 tag)
- H ☐ No Class Number
- ☐ Other Classification (8 characters max) _____

Biographee's Surname Letters

- 100 ☐ No Name
 - 101 ☐ First letter of biographee's surname
 - 102 ☐ First 2 letters of biographee's surname
- (continued on next page)

OCLC Cataloging PLUS B&T MARC™
(Dewey Classification – DVD)

Biographee's Surname Letters (continued)

- 103 ☐ First 3 letters of biographee's surname
- 104 ☐ Biographee's complete surname
- 105 ☐ First _____ (max of 8) letters of biographee's surname
- 106 ☐ Surname longer than 8 characters, truncate after 7th character & add a comma
- 107 ☐ Surname less than 8 characters, add a comma

Biographee's First Name Letters

- 100 ☐ No biographee first name letters
- 101 ☐ First letter of biographee's first name
- 102 ☐ First 2 letters of biographee's first name
- 103 ☐ First 3 letters of biographee's first name
- 104 ☐ Biographee's first name
- 105 ☐ First _____ (max 8) letters of biographee's first name

Biography Title Main Entry Letters

- 100 ☐ No letters
- 101 ☐ First letter of title
- 102 ☐ First 2 letters of title
- 103 ☐ First 3 letters of title
- 104 ☐ First word of title
- 105 ☐ First _____ (Max 8) letters of title

Biography Publication/Copyright Date Suffix

When selected, date will appear on spine label and call number in MARC record

- ☐ No Date
- P ☐ Publication Date - When there is no Publication date, Copyright will be used
- C ☐ Copyright date - When there is no Copyright date, Publication date will be used

Feature Film Classification

- A ☐ F
- B ☐ FIC
- C ☐ FICTION
- D ☐ Dewey Number (as given in the 082 tag).
- F ☐ 791.4372
- G ☐ 791.43
- H ☐ No class number

Feature Film Title Main Entry Letters

- 100 ☐ No main entry letters
- 101 ☐ First letter of main entry
- 102 ☐ First 3 letters of main entry
- 103 ☐ First 3 letters of main entry
- 104 ☐ First full word of main entry
- 105 ☐ First _____ letters of main entry (maximum 8 letters)
- 201 ☐ First letter of title
- 202 ☐ First 2 letters of title
- 203 ☐ First 3 letters of title
- 204 ☐ First word of title
- 205 ☐ First _____ letters of title (maximum 8 letters)

Feature Film Publication/Copyright Date Suffix

When selected, date will appear on spine label and call number in MARC record

- ☐ No Date
- P ☐ Publication Date - When there is no Publication date, Copyright will be used
- C ☐ Copyright date - When there is no Copyright date, Publication date will be used

OCLC Cataloging PLUS B&T MARC™
(Dewey Classification – DVD)

Non-English Language Material

Non-English Language Classification

- A ☐ Use Dewey Number in 082 tag
- B ☐ Use 3 letter language code as designated in 008 tag
- C ☐ Reclassify class to whatever type of collection type defined for the title.
- D ☐ Will not create a classification and will generate the cutter from the author letter selections on C-CLASS.
- E ☐ Will not create a classification and will generate the cutter from the author letter selections under foreign language.

Non-English Language Prefix

- A ☐ No special prefix
- B ☐ Use 3 letter language code as designated in 008 tag
 - ☐ Other prefix (8 characters max) _____
 - ☐ 1 Print 1 letter of foreign language as prefix
 - ☐ 2 Print 2 letters of foreign language as a prefix
 - ☐ 4 Print 4 letters of foreign language as a prefix
 - ☐ 5 Print 5 letters of foreign language as a prefix
 - ☐ 6 Print 6 letters of foreign language as a prefix
 - ☐ 7 Print 7 letters of foreign language as a prefix
 - ☐ 8 Print 8 letters of foreign language as a prefix

Non-English Language Title Main Entry Letters

- 100 ☐ No letters
- 101 ☐ First letter of title
- 102 ☐ First 2 letters of title
- 103 ☐ First 3 letters of title
- 104 ☐ First word of title
- 105 ☐ First _____ (max 8) letters of title

Non-English Language Pub/Copyright Date Suffix

When selected, date will appear on spine label and call number in MARC record

- ☐ No Date
- P ☐ Publication Date - When there is no Publication date, Copyright will be used
- C ☐ Copyright date - When there is no Copyright date, Publication date will be used

Digital Media Processing

Processing – check one

- ☐ Unwrap and remove security– no other processing
- ☐ Unwrap and process with DMP instructions below

Cases (347)

- 000 ☐ Process in producer's original case
- 440 ☐ Process all in black plastic cases
- ☐ Please contact me about cases for repackaging

Collections and volume set handling

- ☐ Process boxed collections in single cases
- ☐ Repackage volume sets in single cases and process
- ☐ Repackage volume sets in multi-disc cases (default for DMP processing)
- ☐ Do not process titles with _____ discs or more

Border

- ☐ No
- ☐ Yes
- ☐ Top
- ☐ Bottom
- ☐ Both

OCLC Cataloging PLUS B&T MARC™
(Dewey Classification – DVD)

Size

Top Border: ☐ 1/2" ☐ 3/4" ☐ 1" Bottom Border: ☐ 1/2" ☐ 3/4" ☐ 1" Border Color (White is default) _____

Spine Label

☐ No ☐ Yes

Text Alignment

☐ Left Justify ☐ Center

Standard spine label font is Arial 10.

If a different font or size is needed for spine labels please specify here: _____

Spine Label Placement

☐ Vertical ☐ Horizontal

Ownership Information

☐ Top border
☐ Bottom border
☐ Front cover ☐ Centered ☐ Right ☐ Left
☐ Back cover ☐ Centered ☐ Right ☐ Left
☐ Other location: _____

Ownership Information

Line 1: _____
Line 2: _____
Line 3: _____
Line 4: _____

Ownership Label Font

Size: _____ Text Color: _____
Style: _____ Background Color: _____

Customer supplied Hub Labels on disc

☐ Apply library supplied hub label to 1st disc in a case
☐ Apply library supplied hub label to each disc in a case

Rating Label Sticker - Unrated titles will not receive sticker

100 ☐ No rating label
490 ☐ Apply MPAA rating label
Placement _____

Barcode

☐ None
☐ Apply customer supplied barcode (skip to barcode placement)
☐ Provide numbers with _____ (5-14) digits, including check digits if noted below
☐ Include a check digit in the last position of my barcode number
☐ Include the following prefix _____ as part of my barcode/accession number

Barcode Number Range (Provide at least 1000 #'s)

Starting Number Range Ending Number Range

Barcode Label Symbology

090 ☐ Code 3/9
090 ☐ Code 3/9 with Modulus 10 check digit
(continued on next page)

OCLC Cataloging PLUS B&T MARC™
(Dewey Classification – DVD)

Barcode Label Symbology (continued)

- 092 ☐ Code 3/9 with Modulus 43 check digit
095 ☐ Codabar
100 ☐ Interleaved 2/5 (code 1-2/5)
105 ☐ Code IV (Winnebago LCS III/Apple software)
110 ☐ Circ Plus 2/5

Barcode Label Content

- ☐ No text on label, digits & stripes only
A ☐ Add one line of static text on barcode as follows: _____

Barcode Placement

- ☐ Horizontal ☐ Vertical - data reads from top to bottom ☐ Loose

Barcode Label Location

Check location of barcode on CD graphics

☐ E	☐ F	☐ A	☐ B	☐ Other Placement: _____
☐ G	☐ H	☐ C	☐ D	_____
BACK		FRONT		
OUTSIDE				

Library Logo

- ☐ No ☐ Yes – Supply library logo in electronic format as .JPEG file. Quality of 300dpi or better.
E-mail to dmp@btol.com

Logo Placement: _____

Other Digital Labels

List any other digital labels needed: _____

Please provide color samples of the listed labels to be imprinted and .JPG files if available.

Theft Detection

- | | |
|--|--|
| ☐ None | ☐ 3M sensitized/desensitized |
| ☐ Provide 3M DCD2 device on 1 st disc only | ☐ Provide 3M DCD2 device on all discs
(double sided DVDs will not receive DCD2 device) |

Checkpoint – select one

- | | |
|---|---|
| 289 ☐ 310 series (8.2 MHZ frequency) | 291 ☐ 410 series (8.2 MHZ frequency) |
| 293 ☐ 320 series (9.5 MHZ frequency) | 294 ☐ 420 series (9.5 MHZ frequency) |

RFID - unprogrammed – select one

- | | |
|---|---|
| 277 ☐ Apply Customer Supplied RFID tag | 305 ☐ Apply Customer Supplied RFID tag and cover label |
|---|---|

Placement of Theft Detection/ RFID

- | | |
|---|---|
| ☐ Apply to single side discs (DCD2 only) | ☐ Back side of artwork where _____ |
| ☐ Outside case, where _____ | ☐ Inside case, where _____ |
| ☐ Other location: _____ | |

If you don't need printed catalog cards or Shelflist, STOP here.

Sorted Cards

Cards will provided with each shipment

- ☐ None
115 ☐ Provide cards indicated below. Cards will be provided per title and will be bundled within each shipment based on the Shelflist and Dictionary Card Sort options chosen.

OCLC Cataloging PLUS B&T MARC™
(Dewey Classification – DVD)

Catalog Cards

Provide Cards Listed below

- ☐ Shelflist card
☐ Title card
☐ Subject added entry card

- ☐ Series added entry card ☐ Other added entry card
☐ Main Entry card
☐ Series card

Trace on Subject Added Entry

- A ☐ LC headings
C ☐ LC juvenile headings
- B ☐ LC headings (without subdivision “Juvenile films”)

Added Data on Shelflist Card

- ☐ Order date
☐ Purchase Order number
- ☐ Barcode number ☐ List Price
☐ Holding Code – 15 Characters max

Sort Breaks

- B ☐ Sort Shelflist; put dictionary cards with DVD
E ☐ Sort all cards; extra cards, if any, sorted in separate alphabets according to options in Shelflist Sort and Dictionary Card Sort

Shelflist Sort

- A ☐ Sort Shelflist by classification
C ☐ Don't sort Shelflist
- B ☐ Sort Shelflist by main entry

Dictionary Card Sort

- A ☐ Sort all cards in one dictionary
C ☐ Sort all cards in divided catalog: 1)title 2)subject

Additional notes

Date submitted _____

I have reviewed these specifications and am authorized to instruct that they be installed for this institution.

Name _____

Title _____ Date _____

Exhibit 9

Customized Library Services Description

Our Customized Library Services division offers enhanced cataloging/processing services, as outlined below. Should the Library have interest in receiving additional information or pricing for these services, please contact our offices.

Project Management

The formation of Baker & Taylor's Customized Library Services (CLS) brought with it the development of a project-oriented approach to Ongoing Collection Development, Opening Day Collections, and Ongoing Online Cataloging and Processing services. This approach allows CLS management to schedule all facets of a project or ongoing service, including resources, and provides the foundation and framework for the entire project while creating a mutual understanding of the requirements of both the Library and CLS.

All project teams consist of a minimum of a Customer Success Manager, collection development manager, an automation specialist / cataloging / processing manager, and an account coordinator. Team members are responsible for managing their assigned resources to complete the project. In turn, each team member works closely with the Success Manager to ensure compliance to all requirements.

The project team immediately becomes part of the response team and helps develop an approach that will successfully complete the project and meet the library's requirements. This process ensures that all management resources are in place prior to the submission of our response. Our experience has shown that when the library sets up a project team with similar project responsibilities and scope in advance of the project or ongoing service startup, the documentation and implementation of services is more efficient, accurate, and thorough. Additionally, the library's internal project team, supported by a designated library project manager, can provide a central point of contact for all issues and information. This helps to foster communication and to ensure that all internal library timelines and schedules are met.

Upon successful award, the Customer Success Manager (CSM) immediately contacts the library's project coordinator to begin developing the partnership that will carry throughout service to the library or the projects' completion. At this time, the CSM contacts the library to review the next steps in the process, to schedule possible site visit dates, and to request samples of barcodes, genre labels, ownerships labels or other labels as applicable. The CSM will work with the library to schedule a series of conference calls, including the appropriate B&T and library project team members. The goals of these calls will be to establish connectivity to the library's catalog, review the cataloging and processing specifications supplied in the proposal process and further define them if needed, profile any collection development needs, and assist in the coordination of any electronic ordering/account set up. At the end of these conference calls, all project team members will review their notes and will provide a comprehensive requirements documentation package to the library. Upon receipt of the library's approval of the requirements package, the team will create cataloged and processed samples.

The CSM will deliver these samples to the library, giving our staff an opportunity to further confirm our understanding of requirements. At this time the CSM can walk the library through placing their first orders and discuss a fulfillment schedule with the library.

Ultimately, the key to successful project management is communication. Internally, we emphasize and focus on team communication for facilitation and completion of all processes and tasks. Externally, this communication is no less important. Team to team communication between the library and our team builds a confidence and the environment that is needed for the successful completion of any project. In support of this “communications environment”, the CSM is responsible for establishing regular conference calls with the library and all B&T team members. These meetings can serve a number of purposes, such as the regular review of profiles, requirements, and project status updates. Our experience has also proven that these meetings and calls aid in the development of the relationship between our team and the library by promoting open lines of communication at all times and by helping to resolve any issues or questions.

Cataloging Methodology

Customized Library Services' custom cataloging is Baker & Taylor's premier service. CLS has performed on-line cataloging, editing and maintenance for Libraries since 1989. Our preferred method is to access the Library's ILS using the Z39.50 protocol. Customized Library Services has developed a state of the art cataloging methodology that leverages Z39.50 protocol for accessing the library's database and a resource pool of records from the Library of Congress and any Baker & Taylor created records. This technology allows our CLS catalogers to have access to the most current version of the library's cataloging records without the overhead of being directly online. Records obtained from the Library's database are saved to a library specific work file located in our secure cataloging utility. The records in the work file are used in the creation of spine labels and as a vehicle for providing item-linking information.

Major Features of the CLS Preferred Cataloging Methodology (Z39.50):

Only authorized CLS catalogers have access to the library's database and work file. The cataloger will process material first by searching for a matching record in the library's database and work file simultaneously.

A successful search occurs when our cataloger matches the data elements found in the appropriate record tags. CLS considers the title, author, imprint/publisher, edition and date of publication when matching a record. During the CLS profiling, the project team will document the appropriate attributes for matching records. When a matching record is found, the appropriate item level information (examples: barcode number, list price, collection code, etc.) is keyed and the record is saved to the library's work file.

If a record is not found in the library's database or work file, the CLS Bibliographic Database is searched, followed by LC MARC. The CLS Bibliographic Database contains all CIP records upgraded to full MARC

standards by CLS catalogers, as well as new records created by CLS original catalogers.

If the record is not found in the above resources, the Library may also choose to have CLS search OCLC on their behalf for records not found in the library's catalog. Once a record is located in OCLC it is saved to the Library's work file and the record is updated to the Library's specifications. The option of utilizing OCLC will also help to minimize the Library's need for original cataloging. Please note that the process of using OCLC is available upon CLS' receipt of a signed third party agreement which grants permission to our catalogers to access OCLC on the library's behalf. There are no additional charges from CLS for this service. However, it should be noted that all corresponding OCLC charges will be the responsibility of the Library. On a weekly basis, an electronic file is sent to OCLC to update the library's holdings for all contributed records.

When a full matching record is found in one of the resource databases, it is upgraded to meet the library's specifications and the appropriate item tag is keyed. The record is then saved to the library's work file.

If the matching record found is not a full level record, the record is upgraded to meet LC standards and is saved to the CLS Bibliographic Database. The record is then further edited to meet the library's specifications and the appropriate item record is keyed. The record is then saved to the library's work file. The exception to a full level record would be that some AV pre-pub records are not upgraded to full MARC standards. However, these records are upgradeable to the Library's local standards. If a matching record cannot be found in the multi-database search string, a request is forwarded to an original cataloger in the CLS department. Our original catalogers will create a record according to RDA rules. LC authority files are used to validate author and subject headings. Once the record is created, it is saved into the CLS Bibliographic Review File. Once the record has been reviewed and approved, it is saved in the CLS Bibliographic Database. The library's assigned cataloger is notified and the record will be edited to meet the library's specification and appropriate item tag is keyed.

Every title sent to the library will have a full MARC record with the appropriate item tags. The records will either be new additions to the library's catalog, edited and modified to the library's standards, or existing records from the library's catalog.

When the cataloger has completed the order, laser printed label sets consisting of spine, barcode, bibliographic, and other labels as required by the library are printed. The barcode is provided in a standard format, with an eye readable number strip available. All other labels are customizable for font, pitch, boldness and italics. Options for label font include Courier, Times New Roman and Arial and pitches 12, 14, 16 and text can be left justified or centered. For thin books, we can provide one line spine labels and for Picture Books we can provide a larger font author letter spine label. The library will supply a unique barcode range, barcode prefix, and symbology information.

Call number and bibliographic information is extracted directly from the MARC record to ensure accuracy. After the labels are printed, a file of MARC records corresponding to the titles in the order is created. Released records are flagged so they cannot be selected again.

The file of records will be put on the B&T FTP server for the library to retrieve and load. The records are maintained on the Library's work file for historical reference.

Processing Services

The Customized Library Services department has over 300 trained professionals staffed to handle the library's customized requirements. These staff members are dedicated to meeting the library's requirements and exceeding your expectations. Our commitment to excellence and doing the job right the first time is unmatched in our industry. After cataloging is complete, the processing department completes the physical processing of each item. The processors review the processing instructions gathered at the site visit. Following these instructions, the processor attaches the spine label, barcode, and any special labels required by the library. After the application of all physical components, the library's materials move to the jacket selection area. Experienced technicians size the books so the appropriate Mylar jacket can be applied to the dust cover of the book. After the material is fully processed, it is ready for the final and most important stage in our CLS process, back audit.

Back Audit

The back audit team is the final step in ensuring the material we ship to the library is of the highest quality and is in compliance with the library's profiled specifications. The CLS back auditors inspect each order by cross referencing the completed processing and the processing instructions gathered at the site visit. Once the library's material passes this stage, the order is ready to be staged for delivery to the library.

Exhibit 10

axis360 
*digital media library
by Baker & Taylor*

Digital Library Services

That Revolve Around You



Uniting Libraries and Communities

One Download at a Time

What is Axis 360?

Axis 360 is a partnership that supports your library's mission of open access and content sharing across your community, inspiring readership and attracting new library patrons. Axis 360 is designed to make it easy for libraries to circulate eBooks and other digital content, and to mainstream the selection, circulation and reporting for digital formats in the systems and workflows that libraries use every day. We are your digital library solution.

Why Axis 360?

Axis 360 is designed to engage users of all ages with simple management tools that allow your library to curate local-interest title collections as well as showcase high-demand new releases. Add Baker & Taylor's proven leadership in selection and collection guidance across all formats, and Axis 360 is a by-librarians-for-librarians dream.

It's Easy for Your Users

- + Just three simple steps to read or listen, using only a barcode
- + Renew items on the fly and return books early
- + ADA Accessibility features built in

Delivers Reading Options for Readers on the Go

- + Read Now: Instant reading and listening in your web browser
- + Axis 360 Apps: Directly install from the Apple, Google and Kindle app stores
- + Adobe DRM formats: For download and syncing to e-reading devices
- + SimplyE App integration: Supporting Library Simplified services

Pop Up Library - Community Outreach Program

Your Library, Wherever You Want the Library to Be

No apps to install

No credentials required

No barriers to reading

- + Build brand awareness for the library throughout your community
- + Boost visibility and usage of your digital collection
- + Remove barriers to getting started with digital reading and borrowing
- + Engage the public in programming and create new library patrons



Digital Library Management Tools

As Easy as ABC

Title Source 360—the industry's best materials selection tool—powers Axis 360 digital selection as well as print. And, Axis Admin lets you assign roles that manage everything about your digital collection.

- + **Comprehensive Format Coverage** gives you one easy workflow to order digital *and* print editions
- + **360-Degree Duplicate Check** provides the full picture of title coverage for all formats
- + **Customized New Title Notifications** keep you in-the-know about forthcoming titles
- + **Print-to-Digital Cart Conversion** turns print lists into eBook and eAudio lists in a flash
- + **Patron Request Alerts** for consideration in adding titles to your collection
- + **Metered-Content Communications** with re-order carts delivered to your TS360 login
- + **Circulation Analysis Reports** for optimizing budget and aligning with user demand
- + **Digital ESP** guided selection plans for hands-free acquisitions



Digital Resource Sharing with Local Schools

More Children, Reading More!

- + Access public library materials at school using your student ID
- + Full integration with Follett Destiny and other ILS OPACs
- + Delivers age and grade-appropriate titles to every school building
- + Boosts usage and ROI from your library's Children's and Teen content
- + Circulation reports detail each school's activity with your collection



Library Sharing Communities

Cooperative Content Access, More Circulation, Fewer Holds

- + Form a sharing federation for digital content lending
- + Order independently for your community's needs
- + Reserve content for your patrons, until you decide to share
- + Unique scoping tools for schools sharing in public library content
- + Circulation reports detail all patron and collection activity



Making Axis 360 Your Digital Content Partner is Easy

It's Your Digital Library

Baker & Taylor provides transition services that have made libraries large and small successful in switching eContent providers:

- *Your library can keep its existing eContent collections, and grow your digital usage on Axis 360*
- *We work with the publishers to transfer your collections, including metered titles*
- *We'll replicate the holds queue, so patrons maintain their priority order on Axis 360*
- *We help you communicate with patrons to smooth the change of service*
- *We can provide direct patron technical support through the transition and beyond*

Ready to make the switch? Email Axis360@baker-taylor.com to get started today.



Baker & Taylor is the proud Content Hosting and Circulation Partner for Open eBooks. Since February 2016, we have delivered more than 2 million eBook downloads to children in need.

III. AUDIOBOOKS

- Specify the audiobook discount rates the vendor will offer. In Comments, specify discount conditions/restrictions/other, if applicable.

Type	Discount Rate %		Minimum Order Amount, if any, for Discount Rate to Apply	Comments
	1 Copy	2+ Copy copies per title		
Audiobook CD Category Def. XII.	45.0	2-4 copies= 45.5 5+ copies= 46.3	None	
Downloadable audio	0.0	0.0	None	Per Axis 360 digital platform
Streaming audio	No Bid	No Bid		
Fiction *	0-45.0	0-45.0	None	*
Nonfiction *	0-45.0	0-45.0	None	*
Current/Popular *	0-45.0	0-45.0	None	*
Non-English Language *	0-45.0	0-45.0	None	*
* may be of any material category, see Exhibit 1 for a complete schedule				
Other - List Below:				

- Specify the audiobook cataloging/processing pricing the vendor will offer. In Comments, specify pricing conditions/restrictions/other, if applicable.

Type	Discount / Pricing		Minimum Order Amount, if any, for Discount/Pricing to Apply	Comments
	Attached	Unattached		
Media Processing Package Per Item (removal of shrink wrap and security devices, re-package in standard case, insertion of scanned publisher artwork, label)	\$6.79	\$6.79	None	Per unit Note: Due to supplier restrictions, scanned artwork is not available for titles produced by Blackstone Audio. ZAR
MARC Record - Standard	\$0.49	\$0.49	None	Per record
MARC Record - Custom	\$0.49	\$0.49	None	Per available edits within techXpress service

Exhibit 3

Enhanced Services Program ***(Optional Service – Print and Spoken Word Audio CD only)***

Baker & Taylor is pleased to provide a service that will save your library time and money when procuring titles from small and hard to find publishers. By utilizing B&T's vast publisher and title database, the library can purchase a wide variety of low demand and small print run titles from associations and limited edition, prepayment, and non-returnable publishers.

Baker & Taylor's Enhanced Services Program (ESP) provides the library with access to millions of active book titles representing over 75,000 imprints. This breadth of coverage is greater than that of any other book industry wholesaler.

The ESP program builds on Baker & Taylor's already outstanding publisher relations by:

- Expanding our vendor relations team responsible for the follow-up of all publisher orders, improving the speed of delivery of all titles to the library;
- Widening our publisher base to include hundreds of small non-commercial publishers formerly considered apply direct by the book industry; and
- Increasing our reporting capabilities by providing order status reports for 100% of all titles not yet published, and by supplying anticipated publication release dates for all out-of-stock items.

In order to provide these enhanced title acquisition services, Baker & Taylor will apply a service charge to qualifying titles. Material where Baker & Taylor receives no discount from the publisher, or where prepayment is required by the publisher, or books of small, limited in-demand and/or non-commercial publishers will be invoiced at list price plus the \$4.95 per unit surcharge.

For libraries concerned about purchasing these types of titles, B&T's Title Source can assist the librarian in researching a particular item's category and format. Surcharge titles will appear with a Y or Q in the discount code field. Additionally, you may contact your Customer Service representative or Information Services via phone, fax, or e-mail (btinfo@baker-taylor.com) to determine surcharge titles before placing an order.

As a convenience to the library, B&T can exclude these titles from all orders by adjusting the library's account profile setup. Please contact your Customer Service Representative for additional information.

Table of Contents

<i>MALiA RFP Document/Baker & Taylor Response</i>	Pages
Signed Cover Sheet	1
MALiA Terms and Conditions	2-15
MALiA Attachment A Offeror Data Sheet	16
MALiA Attachment B	
Service Requirements Deemed Important in Consideration of Contactor Selection.	17-65
MALiA Attachment C Offeror Discount Pricing Sheets	66-78
MALiA Attachment D MALiA Member List	79-84
MALiA Attachment E Small Business Subcontracting	85-86
MALiA Attachment F	
Virginia State Corporation Commission SCC Registration Information	87
MALiA Attachment G Proprietary/Confidential Information	88
MALiA Attachment H URFP Checklist	89
 <i>Baker & Taylor Exhibits</i>	
Terms and Conditions of Sale	Exhibit 1
Material Category Definitions	Exhibit 2
Enhanced Services Program (Optional Service)	Exhibit 3
Return Policies	Exhibit 4
Ordering and Service/Sales Staff Contact Information	Exhibit 5
Sample Invoice	Exhibit 6
Collection Development Services	Exhibit 7
techXpress Cataloging/Processing Services	Exhibit 8
Customized Library Services Description	Exhibit 9
Axis 360 Digital Services	Exhibit 10
 <i>Other RFP Documents</i>	
Questions/Answers	
Addendum 1	

V. VIDEO

1. Specify the video discount rates the vendor will offer. In Comments, specify discount conditions/restrictions/other, if applicable.

Type	Discount Rate %		Minimum Order Amount, if any, for Discount Rate to Apply	Comments
	1 Copy	2+ Copy		
DVD	29.0	29.0	None	
Blu-ray	29.0	29.0	None	
Streaming video	No Bid	No Bid		
Feature/Entertainment	29.0	29.0	None	
Educational/Instruction	29.0	29.0	None	
TV Shows	29.0	29.0	None	
Animated	29.0	29.0	None	
Foreign	29.0	29.0	None	
Video games	No Bid	No Bid		
Other - List Below:				

2. Specify the video cataloging/processing pricing the vendor will offer. In Comments, specify pricing conditions/restrictions/other, if applicable.

Please Note: Cataloging/Processing Services are not available for product issued by Buena Vista Home Entertainment, aka Walt Disney Studios Home Entertainment (BVHE). *LAD*

Type	Discount / Pricing		Minimum Order Amount, if any, for Discount/Pricing to Apply	Comments
	Attached	Unattached		
Media Processing Package Per Item (removal of shrink wrap and security devices, re-package in standard case, insertion of scanned publisher artwork, label)	\$2.65	\$2.65	None	Per unit, includes 3 embedded labels
MARC Record - Standard	\$0.75	\$0.75	None	Per record
MARC Record - Custom	\$1.50	\$1.50	None	Per available edits within techXpress service

Library of Virginia

Reference check for Baker & Taylor

Firm Contacted: Ocean State Libraries

Individual: Steve Spohn (SSpohn@oslri.net)

Title: Executive Director

Reference completed by: Lisa Sallee, Assistant Director lsallee@oslri.net

1. What kind of arrangement is in place with your Library and this firm?

We are a customer with BTCat as of January 1, 2022.

2. How long have you been doing business together?

We started working with them in a Beta format in April 2021.

3. Are you satisfied with this firm's service

Yes, very much so.

4. Any specific problems with:

Customer service: no

Quality of Service no, their product is just out of its infancy and their bibliographic database is growing weekly along with their customer base.

Timeliness of required information: not sure what this question is asking

Price for service: we are not going to reveal that

5. Would you enter into a contract/business arrangement with them again?

Yes.

6. Additional comments?

We have wanted an alternative solution to OCLC CONnexion for a very long time. The lack of competition and the size of that product which was not being enhanced and developed, was delivering increasingly poorer quality records at an increasingly more expensive price was out of hand. BTCat is promising to deliver a product that avoids many of our primary complaints with OCLC and the customer service, communication and ongoing development of the product is

really impressive. We would recommend it to any of our peers. We are a large consortium in a small state and already this product has helped us improve our cataloging and reduced our consistent backlog by over 50%.

Library of Virginia

Reference check for Baker & Taylor

Firm Contacted: Nassau Library System

Individual: Robert Drake (RDrake@nassaulibrary.org)

Title: Assistant Director, Technology Operations

Reference completed by: Robert Drake

1. What kind of arrangement is in place with your Library and this firm?
Baker & Taylor has provided various services to the member libraries of the Nassau Library System including: wholesale book sales, book disposal, and software (most recently BTcat).
2. How long have you been doing business together
10+ years
3. Are you satisfied with this firm's service
Very much

4. Any specific problems with:

Customer service: None – our experience with B&T customer service has been exceptional. Of all the library vendors we work with they are easily the most responsive and accommodating.

Quality of Service: High. During the height of the pandemic, certain book deliveries were delayed however that has largely been rectified and even during logistics delays they provided good communication.

Timeliness of required information: No issues.

Price for service: No issues.

5. Would you enter into a contract/business arrangement with them again?
Yes
6. Additional comments?
We have had a great relationship with B&T for many many years.
