



COMMONWEALTH OF VIRGINIA  
STANDARD CONTRACT

Contract No. UCPJMU5842

This contract entered into this 26<sup>th</sup> day of August 2020, by Yankee Book Peddler, Inc. dba GOBI Library Solutions from EBSCO hereinafter called the "Contractor" and Commonwealth of Virginia, James Madison University called the "Purchasing Agency".

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

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

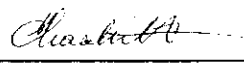
PERIOD OF PERFORMANCE: From January 29, 2021 through January 28, 2024 with two (2) three-year renewal options.

The contract documents shall consist of:

- (1) This signed form;
- (2) The following portions of the Request for Proposal LBS-1072 dated:
  - (a) The Statement of Needs,
  - (b) The General Terms and Conditions,
  - (c) The Special Terms and Conditions together with any negotiated modifications of those Special Conditions;
- (3) The Contractor's Proposal dated March 4, 2020 and the following negotiated modification to the Proposal, all of which documents are incorporated herein.
  - (a) Negotiations Summary, dated August 26, 2020.
  - (b) Schedule 1- GOBI Library Solutions Technical Services Price List

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

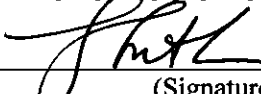
CONTRACTOR:

By:   
(Signature)

Kate Hartnett  
(Printed Name)

Title: Vice President, Finance and Accounting

PURCHASING AGENCY:

By:   
(Signature)

LecAnne Beatty Smith  
(Printed Name)

Title: Buyer Senior, JMU

**RFP # LBS-1072 Monographic Services**  
**Negotiation Summary for Yankee Book Peddler, Inc.**  
**dba GOBI Library Solutions from EBSCO**

**8/26/20**

1. Parties agree that this Negotiation Summary modifies RFP# LBS-1072 and the Contractor's initial response to RFP# LBS-1072, and in the event of conflict this negotiation summary shall take precedence.
2. Contract Pricing: Contractor shall extend the following pricing and discounts to VASCUPP schools and all Virginia higher education institutions that elect to use this contract cooperatively.
  - A. The first annual period of the contract (January 29, 2021- January 28, 2022) shall have a discount structure based on an expenditure level of \$5,000,000 -\$6,999,999. For each subsequent annual period of the contract, the discount structure shall be determined by the collective expenditures of all Virginia higher education institutions accessing this contract during the previous calendar year (January 1-December 31). The Contractor shall provide a report to James Madison University at the end of each calendar year that provides detail on the previous calendar year's total contract sales broken down by institution and resource category.

<b>Expenditures up to \$ 1,999,999</b>	<b>Discount off Publisher's List Price</b>
Approval Plan US and UK (print)	17% US/ 7% UK plus freight
Firm Orders US and UK (print)	17% US/ 7% UK plus freight
Standing Orders (print)	8% US/ 5% UK plus freight
E-books- exempt from regular discounts. All e-books are sold at publisher's list price without markup	0% (1% credit incentive*)
<b>Expenditures of \$ 2,000,000-\$3,999,999</b>	<b>Discount off Publisher's List Price</b>
Approval Plan US and UK (print)	18% US/ 8% UK plus freight
Firm Orders US and UK (print)	18% US/ 8% UK plus freight
Standing Orders (print)	9% US/ 6% UK plus freight
E-books- exempt from regular discounts. All e-books are sold at publisher's list price without markup	0% (1.5% credit incentive*)
<b>Expenditures of \$4,000,000-\$4,999,999</b>	<b>Discount off Publisher's List Price</b>
Approval Plan US and UK (print)	19% US/ 9% UK plus freight
Firm Orders US and UK (print)	19% US/ 9% UK plus freight
Standing Orders (print)	10% US/ 7% UK plus freight
E-books- exempt from regular discounts. All e-books are sold at publisher's list price without markup	0% (2% credit incentive*)
<b>Expenditures of \$5,000,000-\$6,999,999</b>	<b>Discount off Publisher's List Price</b>
Approval Plan US and UK (print)	20% US/ 11% UK plus freight
Firm Orders US and UK (print)	20% US/ 11% UK plus freight
Standing Orders (print)	11% US/ 9% UK plus freight
E-books- exempt from regular discounts. All e-books are sold at publisher's list price without markup	0% (2.5% credit incentive*)

**RFP # LBS-1072 Monographic Services**  
**Negotiation Summary for Yankee Book Peddler, Inc.**  
**dba GOBI Library Solutions from EBSCO**

**8/26/20**

<b>Expenditures of \$7,000,000+</b>	<b>Discount off Publisher's List Price</b>
Approval Plan US and UK (print)	20.5% US/ 11.5% UK plus freight
Firm Orders US and UK (print)	20.5% US/ 11.5% UK plus freight
Standing Orders (print)	11.5% US/ 9.5% UK plus freight
E-books- exempt from regular discounts. All e-books are sold at publisher's list price without markup	0% (3% credit incentive*)
<p><b>* GOBI ebook Incentive</b> – Contractor shall provide universities that purchase \$50,000+ worth of ebooks in a given contract year with a percentage credit of that total (based on the tiered discount structure) that shall be applied to that institution's subsequent purchases in the next contract year.</p>	
<p><b>Discount Exceptions:</b></p> <ul style="list-style-type: none"> <li>• Titles from publishers on the "List Price Publisher's" list.</li> <li>• Titles imported directly from overseas on the library's behalf.</li> <li>• Titles purchased through OP Choice.</li> <li>• Titles where Contractor receives a short discount from the publisher. Short discount titles will have a 15% service fee added to the publisher's list price, with a \$10 minimum and \$25 maximum.</li> </ul>	

- B. GOBI Subscription Services- all fees waived for the initial three (3) years of the contract subject to negotiation at renewal (*with the exception of Reviews*).
- Reviews Annual Subscription: \$570
- C. Shipping- shall be FOB Destination:
- Libraries spending \$30,000 or more in the previous contract year shall have weekly domestic shipping at no cost. For the first year of the contract, spend will be determined by the estimated yearly spend.
  - Libraries that spend less than \$30,000/year may elect bi-weekly shipping at no cost or weekly shipping with an additional freight charge of 5% of the book invoice (*excluding cataloging fees, processing fees, and electronic content*).
  - Books shipped from Contractor's UK warehouse will have an additional freight charge of 6% of the book invoice (*excluding cataloging fees, processing fees, and electronic content*).
  - A Transportation Surcharge of .25% (one-quarter of one percent) of the book invoice (*excluding cataloging fees, processing fees, and electronic content*) shall be added to domestic invoices if the Purchasing Agency is not currently paying a 5% freight charge. Per invoice, the minimum fuel surcharge shall be \$1.00 and the maximum fuel surcharge shall be \$25.00.
  - Rush Shipping
    - Rush ground shipping placed on GOBI shall not incur additional fees.
    - Rush next-day or second-day delivery fees will be passed along to the Purchasing Agency at cost.
- D. Holdings Loan Service:
- Three (3) holdings loads per contract year at no cost
  - Four (4) or more holdings loads per contract year- \$515/year

**8/26/20**

- E. Demand Driven Acquisition (DDA)/Patron Driven Acquisition (PDA) programs- annual subscription fees waived.
  - F. BookZone Out-of-Print/Out-of-Stock Acquisitions- Publisher's list price less a 5% discount and plus a 15% service fee.
  - G. Technical Services Pricing- see attached *Schedule 1- GOBI Library Solutions Technical Services Price List*
  - H. No other fees shall apply other than those identified.
3. Contractor's initial response to RFP # LBS-1072 dated March 4, 2020 shall be amended as follows:
- A. IV.A.2 shall be supplemented by the following:

When it comes to crafting a digital or print book collection development solution, GOBI Library Solutions takes a unique and proven approach. First, we engage in close dialogue with customers. This allows us, through collaboration, to develop a highly individualized subject profile based upon publisher coverage and subject specifications appropriate to the scope of a library's subject interests. We believe that the breadth of our publisher coverage as well as the flexibility of our subject profiling allow libraries to establish and maintain subject profiles more predictable, precise, consistent and responsive than other vendors can offer.

To prepare for a new approval profile, we would begin to address the following tasks immediately upon our selection as your vendor:

- Schedule profile writing/revision to occur within 30 days of award notice, or on your timeline
- Determine optimal account structure; define publishers to be included, fund and location assignments and other collection criteria.
- Schedule GOBI training.
- Request a list of standing orders to block or include on approval.
- Plan for a run of retrospective slips (four to eight weeks) to show how a new profile will perform.
- Begin to discuss requirements to support technical services workflow.
- Establish an effective date of coverage; that is, when is the previous vendor's final shipment, and when does GOBI Library Solutions begin shipping?

GOBI Library Solutions is committed to providing initial and ongoing training and support to assist library staff in implementing and utilizing our services. During the first year as an Approval Plan customer, your GOBI Library Solutions Collection Development Manager Alyse Camus will spend time to develop the approval plan library profile and to provide GOBI training. Alyse will revisit within six months of the implementation to review profile performance, analyze returns, confer with selectors on the efficiency of the plan, and to suggest any profile modifications indicated.



**8/26/20**

We will work closely with the University Library System's selectors to review your collection development requirements and to establish a mutually agreeable timetable of key events. The transition process is a highly collaborative process between GOBI Library Solutions and the libraries we serve, and we are committed to working closely with you to ensure a seamless and well-structured plan that serves the needs of you and your patrons. GOBI Library Solutions is committed to providing initial and ongoing training and support to assist library staff in implementing and utilizing our services.

After the first year, assuming the approval plan is working as expected, we would plan on annual visits, or as often as necessary. During any of these visits, Alyse will address profile performance, analyze returns, confer with selectors on the efficiency of the plan and suggest any profile modifications indicated.

Modifications to your profile can be communicated to your Collection Development Manager Alyse Camus by phone, email, or in-person, and Alyse will immediately make any changes you request. We can provide the necessary guidance to ensure the profile's optimal performance. If the profile is not meeting the Library's needs for any reason, Alyse will follow up with the Library staff to make additional updates and ensure that the profile is modified to meet the desired outcome. Typically, profile changes will be in effect within one to two weeks, with results visible in shipments within three to four weeks.

GOBI Library Solutions does not restrict how often or how extensively a library can modify its profile during a fiscal year. Our program is designed to flexibly accommodate your needs, and modification can be made at any time.

The Library will receive written confirmation of all profile modifications. In addition, the profile is available to view online through GOBI.

GOBI Library Solutions uses book-in-hand profiling to obtain information critical to the selection of new titles for a particular library, the notification happens immediately upon profiling. Once book-in-hand allocation decisions have been made by our bibliographers, GOBI enables library selectors to determine whether a title has been included, excluded, or limited to title notification slip coverage. Based on your library profile, GOBI Library Solutions can formulate questions to be answered about any title's subject so that, book-in-hand, the profiler will evaluate each possible subject individually. When the response is "yes" to any one of several subjects a VASCUPP member library is interested in, a book or title notification slip can be allocated. Final format preference will be confirmed by the library before shipment occurs.

GOBI Library Solutions benefits from a team of book buyers who all have extensive experience in selecting books for academic libraries. Each buyer has a keen understanding of the book industry and a close working relationship with the publishers whose output they are responsible for buying. They monitor the publishing industry in general, and their assigned publishers, and they analyze and help to maintain appropriate levels of GOBI Library Solutions inventory. Buyers also attend the major domestic and international tradeshows such as BookExpo America and Frankfurt Book Fair.

Each of our four buyers is responsible for buying from a specific list of imprints. Each buyer

**8/26/20**

has a general understanding of every subject area and approval press type. Our buyers are also supported by a staff of three. We have knowledgeable buyers equipped with systems support who estimate how many books we will need to fill automatic book orders at time of profiling and cover slip orders for the first 90 days after profiling. The appropriate order quantity can range from a very few copies of a book that is unlikely to sell to 150 copies of an important title by a major academic press. Also, one of GOBI Library Solutions' major strengths is that we have access to a broad and deep national inventory that we can draw from covering both trade and academic presses.

Among the 14 people who profile our books are several with advanced academic degrees. Bachelors and advanced degrees held are in such areas as Business Administration, Fine Arts, English and English Literature, History, Education, Economics, Music, Computer Science, Linguistics, Library and Information Studies, and Philosophy.

Our book profilers are subject experts, each specializing in particular disciplines. Profilers are matched against subject matter disciplines by educational training and interest. Consequently, education titles, for example, are generally treated by the profiler with a degree in education, while titles regarding history, for example, are treated by the profiler with advanced study in that discipline. The average profiler has been with GOBI Library Solutions for nearly 10 years. This organizational structure allows us to take advantage of subject interests and expertise, to cross-train and therefor ensure backup coverage of all subject areas while developing new areas of individual expertise, and to divide the volume of work according to publishing output.

Profiling bibliographers are trained over the course of six months to one year by a designated trainer within the unit. Training is comprehensive and includes review of basic LC and Dewey cataloging and the use of profiling descriptors. Profiling descriptors training includes book readership levels, GOBI Library Solutions' "select" terms and non-subject parameters, including mastery of our internal glossary. Training also includes overviews of GOBI and mainstream library journals.

Recruitment strategy is to retain people with a broad and diverse liberal arts background and knowledge of a second language as well as a good sense of the mission of the modern university or college. GOBI Library Solutions expects our profilers to come to us with two years direct experience with bibliography, publishing, academic libraries and higher education. We also seek detailed knowledge of LC subject headings, classification and Dewey Decimal systems as well as knowledge of the requirements of original cataloging and MARC records. Our bibliographers should also possess strong communication and writing skills, evaluation, analytical and decision-making skills.

Some of the resources our profilers routinely consult include encyclopedias and other quick-reference works, Google and other search engines, GOBI, other resources such as EBSCO, the Library of Congress and the British Library. Staff also have access to OCLC's WorldCat. We regularly read review sources such as the New York Times Book Review and Times Literary Supplement. Finally, our profilers and other staff members have developed intranet websites that are in regular use.

The two primary field contacts assigned to work with the VASCUPP member institutions are both librarians with experience in collection development, technical services and acquisitions

**8/26/20**

workflows:

**Ashley Fast**, *Director of Collection Development and Workflow Solutions*, joined GOBI Library Solutions from EBSCO in 2007 after earning her M.L.I.S. degree from the University of Southern Mississippi. Her emphasis in her M.L.I.S. program was cataloging, and she has done continuing education through the Mississippi Library Commission and Wayne State University. As a Senior Collection Development Manager with GOBI Library Solutions, for more than eight years, Ashley has extensive experience with assisting academic libraries meet their collection development and acquisition goals.

**Alyse Camus**, *Collection Development Manager*, has previous experience in public services, preservation, and collection development--skills garnered during her time in positions at Duke University, Indiana University, and Pepperdine University. In addition to pursuing her career in libraries, Alyse has also devoted herself to learning new languages, studying intensely in both Russia and Hungary. She has her B.A. in American Studies and Russian/Eastern European Studies from the University of Texas at Austin and holds subject expertise in area studies through a dual M.A./M.L.S. in Eastern European Studies from Indiana University. Originally from San Diego, California, and with experience across the globe, she now calls the Raleigh/Durham area home and is excited to be working with libraries throughout the region. Alyse can be reached via email at [acamus@ebSCO.com](mailto:acamus@ebSCO.com) or by phone at (919) 370-6986.

GOBI Library Solutions successfully provides approximately 4,325 approval plans to more than 1,545 libraries, ranging from profiled slip plans to specialized subject programs to comprehensive automatic book plans; we have more than 680 Academic Research Libraries around the world as clients (more than 100 ARL Library Members), the majority of which have substantial approval plans with GOBI Library Solutions.

GOBI Library Solutions attributes the success of these profile plans to the monitoring practices by both our internal staff and the communication with our Library partners. As we monitor profile performance carefully, customer approval returns are kept to a minimum. The key criteria in defining/evaluating the performance of an approval plan profile for a library is the number of titles the library feels the need to return. We are proud of the fact that our approval return rate is the lowest in our industry, averaging less than 4%.

GOBI Library Solutions offers several mechanisms for monitoring approval plan performance.

As a part of regular visits and working with the library staff, your Collection Development Manager may suggest possible modifications to the profile based on assessment of its performance (including number of returns). The library makes the ultimate decision for these changes; GOBI Library Solutions will not make automatic modifications to your profile.

In addition, member institutions may choose to self-monitor approval plan performance. In this situation you would request modifications when and if staff selectors decide to change number of books provided to more or fewer, or to adjust the assortment of titles. Staff can run reports in GOBI utilizing a wide variety of sort criteria including LC class and publisher and can also review returns and the reasons for them. Based on an examination of the results of these reports,

**8/26/20**

staff can request the addition or subtraction of certain publishers, for example, or a modification of non-subject parameters in the library profile.

Regular communication between the library and the Collection Development Manager is key to monitoring the performance of the approval plan profile. In addition to reviewing returns, **Approval Activity Reports** can be used to monitor performance. These reports categorize and tally approval activity by subject (LC, NLM or Dewey classification), Library Fund Code, Publisher, Descriptive Parameter, Academic Level, or Series Title. Within each category, data are summarized to reflect all titles (print and electronic) profiled by GOBI Library Solutions, titles profiled for the library, approval titles returned, title notification slips sent and returned as orders. Approval activity for the library can be reported, if chosen, for a single call range, for dates specified, and for University Press or Trade Publishers, together or separately. For returns, the library has the option to include reasons in the Activity report or can run the separate Returned Approval Titles with additional sort/search options.

A variety of factors can trigger suggestions from GOBI Library Solutions for possible modifications to the Library's approval plan profile. These factors can include:

- New program offerings at a university;
- changes to the budget
- and/or an analysis of firm orders by publisher and/or subject area

All of the above can trigger a conversation with the Library about possible modifications to their approval plan profile.

**B. IV.C.1 shall be supplemented by the following:**

GOBI Library Solutions' customers are set up so that they can order by different sub-accounts. We build a base account number with multiple sub-accounts as needed to meet the library's requirements. We will establish separate sub-accounts for the library to place firm orders, approval plan orders, standing order/continuations, award programs, ebook ordering as well as for orders requiring physical processing and those not requiring it. We build a base account number of five or six digits, with two additional digits for each sub-account. Activity can be tracked and reported at the individual sub-account level and/or at the base account level in GOBI. The sub-account numbers enable us to provide separate shipping and billing for the separate profiles as well as for automatic shipments and title notification slip selections.

In addition to the Library, GOBI Library Solutions can work with other university departments to honor discounts and to set up ordering via GOBI if they so desire. We will create either a sub-account under the Library's main base account, or the Department's own base account under which orders may be placed.

**C. IV.H.1 shall be supplemented by the following:**

Depending on the level of service a library chooses, a library can receive up to 100% of titles with a full MARC record; GOBI Library Solutions can provide brief records for 100% of titles purchased through our basic service level.

**8/26/20**

Our in-house cataloging services, “GOBI Metadata Services” provide LC records upgraded by GOBI Library Solutions depending upon the specific needs of the library and are available in four levels:

Basic Service Level- provides LC Full, Core, EL7 Iccopycat, and CIP-level records. The library may choose one of three upgraded options below. LC CIP records can be upgraded to full level with any of these options.

Provisional- If an LC record is not available, GOBI provides a brief in-house cataloging record.

Provisional Plus- If an LC record is not available, GOBI provides an in-house cataloging record. These records include a call number and at least one subject heading, allowing for 100% shelf ready processing.

100% Full Records- If no LC record is available, full records are created by GOBI’s in-house cataloging team and are upgraded with full subject analysis and notes are provided for all titles.

D. IV.J shall be supplemented by the following:

As part of GOBI Library Solutions’ commitment to technological development, innovation and customer service, the GOBI development roadmap is constantly evolving to keep up with customer needs, new advances in technology and industry-wide collection development, acquisition and technical workflow trends. This practice has been consistent throughout our nearly half century of providing service to libraries. In line with this commitment, GOBI Library Solutions has embraced Pragmatic product management and employs pragmatic thinking to ensure that customers’ needs are always at the forefront. Our product teams employ user-centered design principles, working closely with libraries to better understand their content and related process needs and ensure we are addressing those needs. Enhancement requests and feedback from libraries and their users also greatly influence near- and long-term development plans. The GOBI product strategy is centered around choice, content, acquisition models and methods, in conjunction with library integration and automation. Recent GOBI developments in support of these strategic goals are as follows:

**Inclusion of New Content**

GOBI Library Solutions is **committed to providing customer choice when it comes to delivering content**. We strive to maintain the highest-quality content in English and, increasingly, non-English languages, and we leverage our company's outstanding publisher relationships to uphold the quality and stability of these resources. We are continually looking to expand our catalog of 17.3 million titles from the world’s leading scholarly publishers, and profile book-in-hand approximately 80,000 new titles annually. GOBI offers content from 20+ partner platforms (and growing) and works to continuously improve our integration with these platforms to ensure rapid fulfillment of books to your library.

**Recent Enhancements:**

*New Digital Partnerships:* GOBI recently added Brill Publishing as a new platform with coverage of more than 18,000 titles and Bloomsbury Publishing with nearly 8,000 DRM-free e-

**8/26/20**

books and eCollections. Planned partnerships for calendar year 2020 include Duke University Press monographs, DeGruyter eCollections and John Benjamin's monographs and eCollections.

*Enhanced Metadata:* GOBI Library Solutions has expanded its profiling capabilities by enhancing current profiling tags and attributes for use in GOBI searches or in the library's preferred approval workflow. Enhanced tags include Geo-region, Geo-country, Interdisciplinary Topics, and Faculty Affiliation. In addition, GOBI has added new interdisciplinary tags for Disability studies, Poverty studies and Border migration studies. With this enhanced metadata, GOBI users can discover titles in GOBI with more granularity.

### **New Business Models**

GOBI Library Solutions understands that part of the evolving book market includes the introduction of **new and innovative business models**. We are committed to providing ebook services that best meet research library needs and are actively evaluating such trends for viability. We are committed to sustainable-for-all industry practices, and work hard to advocate for, and to maintain, a level playing field across the marketplace.

#### Recent Enhancements:

*Expanded eCollections:* We have expanded our eCollection offering for acquisition through GOBI to include Taylor & Francis, Cambridge University Press and Wiley, as well as Brill.

*Evidence-Based Acquisition (EBA):* EBA packages are now available from Taylor & Francis, Cambridge University Press, and Wiley through the GOBI workflow channel, offering a robust suite of services free-of-charge, to enhance and support EBA workflows.

*DDA Service:* We are continuing to invest in DDA capabilities, workflows and partnerships to ensure a seamless workflow for the library and the ability to choose the acquisition method that works best for the library. Additionally, we are improving DDA integration with existing and new partners, including DDA record management especially for deletions and automatic updating of profiles.

### **Technical Innovation: Automation and Integration**

GOBI Library Solutions' commitment to current technology is directly linked to our growth and success in serving the continuously evolving needs of our customers. Whether the technical requirements call for automation of workflows, or integration between our systems and that of your library's ILS, we have dedicated product development and technology teams in place to manage the processes and ensure that we have the most current tools at hand. GOBI supports Open URL technology and includes Open URL links in our bibliographic records.

#### Recent Enhancements:

*Sequential Invoicing:* GOBI now offers a new invoicing solution that ensures non-repeating invoicing numbers for customers world-wide.



**8/26/20**

*eBooks in Minutes:* GOBI has expanded its eBooks in Minutes rapid fulfillment partnerships by recently adding ProQuest Ebook Central and Taylor & Francis to the existing roster with *EBSCO eBooks*, IGI Global, Digitalia Hispanica, and R2 Digital Library, to activate ebooks on their platforms within minutes following an order being placed via GOBI. (Ongoing continuously – note: requires publisher support).

*GOBI's Auto-Population of eBooks:* GOBI and EBSCO Holdings Link Management (HLM) customers can now choose to get complimentary, automated integration between GOBI and HLM, enabling immediate access to all purchased ebooks, including individual titles, eCollections and Evidence-based Acquisition (EBA) collections.

*GOBI Order API:* We have expanded the reach of GOBI API to include integration with open source ILS' FOLIO, TIND and Koha.

*GOBI/FOLIO Integration:* GOBI supports automated acquisition workflows including pre-order records, EDIFACT ordering from the library's ILS, GOBI API ordering, and EDIFACT invoicing for customers using FOLIO as their Open Source ILS solution.

*GOBI/ALMA Workflow Integration:* We have enhanced the GOBI/Alma workflow integration for EDI Invoicing to include subaccounts, and the GOBI/Alma Order API to include additional order details (reporting codes, interested user) as well as vendor and model codes for improved matching in ExLibris' Community Zone.

### **Investing in the GOBI User Experience**

GOBI Library Solutions aims to continually update and expand the user experience for our GOBI platform. Some examples include: access to additional DRM-free titles which are available on multiple platforms, an improved and enhanced GOBI user interface, and a growing catalog of academic content available across multiple acquisitions methods and models.

#### **Recent Enhancements:**

*DRM-Free eBooks:* Over 1 million DRM-free e-books are now available through GOBI from both publisher platforms and aggregators.

*GOBI Selection Alerts Service:* GOBI offers acquisition librarians daily or weekly email alerts notifying them of new selections. These selections can then be easily submitted for ordering, creating a more streamlined workflow, which is fully configurable by the library.

*GOBI Search Improvements:* Investment is underway in calendar year 2020 to move GOBI to a modern search infrastructure allowing us to enhance GOBI's responsiveness and performance, provide real time updates to search results and library activity, and to be able to respond more quickly to customer needs.

**Longer term strategic initiatives in research and pre-development are in the following areas:**

**8/26/20**

Enhanced Linking and Improved Discovery- Our goal is to offer an expanding metadata and linking service, leveraging new sources of metadata and publisher data, to increase the rate and the timing of linking print and digital ISBNs. This will ensure that a library can easily identify the right instance of a monograph to purchase without unnecessary delay and will increase confidence that funds are spent on the content that is most valuable to the library.

Authoritative Metadata - GOBI metadata, pricing, and availability data will be complete, accurate, and up-to-date in order to streamline the Library's ordering workflow for monographs. This will increase the predictability of title availability and will improve communication around estimated delivery times for monographs.

EBSCO eBook Administration and Collection Management -Implemented in phases to provide more granularity for control of collection including:

- Control download settings at the model, title and subcollection level (Phase 1)
- Important DDA management and reporting enhancements, including expanding cascading options based on customer preferences (including adding more EBSCO models for cascade). Improved DDA Expenditure Reporting (Phase 2)
- Automatic Upgrade enhancements including the ability to control automatic upgrades for subsets of a library collection (Phase 3)

GOBI Interface Redesign – GOBI Library Solutions understands the need for more advanced users to be able to access all of today's powerful features via a modern user interface, and also understand some librarians prefer a more streamlined user experience.

eProcurement – We understand the importance of integration with procurement systems, for customers in certain markets or regions for whom this is required or preferred.

4. Invoicing shall include:
  - A. Percentage discount for each item
  - B. Publisher list price for individual titles
  - C. Unit discounted price
5. The Purchasing Agency will make payment within thirty (30) days of the *receipt* of a valid invoice.
6. Contractor agrees that the following portions of their proposal will be marked as confidential and rescinds all other statements of confidentiality within its proposal dated March 4, 2020:
  - A. A.1, Scope of Service, Firm orders on a one-time basis- select portion on page 1
  - B. A.2, Scope of Service, Approval orders according to profiles established by each institution- select portions on page 4
  - C. C.1, Ordering- select portions on pages 15-16
  - D. J, Vendor Catalog and Order System- select portions on page 34
  - E. J.1.a, Vendor Catalog and Order System, System Functionality, Searching- select portion on page 35



**8/26/20**

- F. J.1.b.i, Vendor Catalog and Order System, System Functionality, Requests, Selectors/liaison librarians- select portion on page 36
- G. J.1.b.ii,(a), Vendor Catalog and Order System, System Functionality, Requests, Academic Faculty, Order Placement- select portions on page 37
- H. M, Trial and Samples- select portion on page 49
- I. Appendix #1- select portions on pages 1-2

## Schedule 1 - GOBI Library Solutions Technical Services Price List

### Pricing for Order Support Services for VASCUPP

*GOBI Library Solutions is mindful of the fact that many VASCUPP libraries are defined as "small" by Carnegie classification tiers and would like to provide those members with the opportunity to take advantage of our best-in-class technical services offerings. A less expensive pricing model may apply for some schools. Please contact your Sales Representative for a customized quote.*

SERVICE	BILLING METHOD	US	UK
			*pricing is indicative of pricing from our UK warehouse
<b>Additions to Cataloging Services for Print</b>			
Fee is added to the per-line price for the applicable metadata service.			
+charge: Dewey cutting or Book/Author numbering: standard 4-figure	per invoice line	\$ 0.39	£ 0.33
+charge: Dewey cutting or Book/Author numbering: custom	per invoice line	QUOTE	QUOTE
+charge: Alternate LC Classification	per invoice line	QUOTE	QUOTE
+charge: Custom Classification for Standing Orders For application of customized classification and piece numbers in cases where libraries class a standing order title together and vary from LC standard practice. These titles must be isolated on a separate subaccount from other standing orders.	per invoice line	\$ 0.94	£ 0.66
<b>Programming Service Fee</b>			
Fee for complex programming only A one-time set-up fee applies to new metadata Service customers or complete revisions to existing services.	one-time fee	\$ 550.00	N/A
<b>MARC Enrichment</b>			
MARC Enrichment data (tables of contents, summaries and author biographical/affiliation information) can be provided in Metadata records at point of shipment. Libraries desiring enrichment of other MARC records must use the batch enrichment service.			
Enrichment in DDA discovery pool records	annual subscription	\$ 1,100.00	N/A
<b>Enrichment in point-of-purchase catalog records (not GobiShip):</b>			
~Enrichment applied by invoice line as records are supplied	per invoice line	\$ 0.99	£ 0.55
~Batch enrichment (customer provides a file that we then process)	per enriched record	\$ 1.16	£ 0.66
~Consortial enrichment or Special Projects		QUOTE	QUOTE
<b>GOBI Holdings Load Service</b>			
GOBI Library Solutions can load files of ISBNs, including previously purged purchase history, for duplication control of subsequent orders and approval shipments and to make GOBI show that a title is already owned.			
3 loads free, fee is charged at fourth load, then unlimited loads until FY end	annual fee	\$ 515.00	N/A
<b>Electronic Invoicing</b>			
GOBI Library Solutions fully supports the output of invoice data in MARC records. Electronic invoices are also available for monographs and serials in a number of standard formats, such as EDIFACT and X12. The proprietary Innovative format for serials is also supported.			
May be in EDIFACT, X12, (or TRADACOMS only for Capita ILS)	no charge	\$ -	£ -

SERVICE	BILLING METHOD	US	UK
			*pricing is indicative of pricing from our UK warehouse
<b>Book Processing</b> A minimum physical processing charge is assessed for every volume shipped on treated subaccounts and covers up to four of the following book processing actions: <ul style="list-style-type: none"> <li>• Supply security device (strip, target or RFID)</li> <li>• Affix security device</li> <li>• One or two impressions of a library ownership stamp</li> <li>• Apply library-supplied barcode</li> <li>• Scan barcode</li> <li>• Program RFID tag</li> <li>• Supply &amp; affix generic date due slip</li> <li>• Supply &amp; affix generic book pocket</li> </ul>	<b>Basic minimum fee without RFID programming</b>	\$ 1.54	£ 1.32
	<b>Basic minimum fee with RFID programming</b>	\$ 2.04	£ 1.76
Supply security device (strip, target, or RFID)	per volume	\$ 0.39	£ 0.53
Affix security device	per volume	\$ 0.39	£ 0.53
One or two impressions of the library ownership stamp	per volume	\$ 0.39	£ 0.53
Affix library-supplied barcode	per volume	\$ 0.39	£ 0.53
Scan barcode	per volume	\$ 0.39	£ 0.53
Program RFID tag	per volume	\$ 0.39	£ 0.44
Supply & affix a generic date due slip	per volume	\$ 0.39	£ 0.53
Supply & affix a generic book pocket	per volume	\$ 0.39	£ 0.53
Supply & affix spine label protector as a barcode protector	per volume	\$ 0.17	£ 0.18
Generate spine label	per volume	\$ 0.44	£ 0.35
Apply thermal transfer spine label & no protector	per volume	\$ 0.50	£ 0.44
Generate & affix book label	per volume	\$ 0.44	£ 0.35
Generate labels without records (record search & retrieval fee)	per volume / one-time setup fee	\$0.94 / \$220.00	N/A
<b>Strengthening, Jacketing, and Binding Treatments</b>			
EasyCover® (formerly known as KapCo, or laminate. Known as Croc-Cover in UK)	per item treated	\$ 2.81	£ 3.50
+charge: Easy Bind hinge reinforcement	per volume	\$ 1.27	£ 1.48
Polyester dust jacket covers	per item treated	\$ 1.54	£ 1.92
<b>Bindery service: GraphicCover®</b> Charges apply only to items receiving treatment. Prices subject to change with 30 days notice— GOBI Library Solutions does not absorb increases in our bindery service providers' charges.	per item treated	\$ 8.60	N/A
<b>Bindery service: Copycover®</b> Charges apply only to items receiving treatment. Prices subject to change with 30 days notice— GOBI Library Solutions does not absorb increases in our bindery service providers' charges.	per item treated	\$ 8.60	N/A
<b>Bindery service: Norlam®</b> Charges apply only to items receiving treatment. Prices subject to change with 30 days notice— GOBI Library Solutions does not absorb increases in our bindery service providers' charges.	per item treated	\$ 10.86	N/A
<b>Bindery service: Buckram/Cloth</b> Charges apply only to items receiving treatment. Prices subject to change with 30 days notice— GOBI Library Solutions does not absorb increases in our bindery service providers' charges.	per item treated	N/A	£ 7.26
<b>Bindery service: Picture Scan</b> Charges apply only to items receiving treatment. Prices subject to change with 30 days notice— GOBI Library Solutions does not absorb increases in our bindery service providers' charges.	per item treated	N/A	£ 6.18

SERVICE	BILLING METHOD	US	UK
			*pricing is indicative of pricing from our UK warehouse
<b>GobiExport</b> MARC-formatted files of titles exported from GOBI. Libraries load GobiExport records to local systems to support the creation of orders without the need to key the data. GobiExport records are brief records derived from the GOBI database. GobiExport Plus records are the best available OCLC records at the time of export.	annual subscription	\$ 1,080.00	N/A
<b>GobiExport-Plus</b> Tier 00	annual subscription	\$ 1,550.00	N/A
All other tiers	annual subscription	\$ 2,065.00	N/A
<b>EOCR</b> MARC-formatted files of titles ordered on GOBI. EOCRs load to local systems to provide a record of items on order without requiring local keying of data. EOCRs are brief records derived from the GOBI database. EOCR Plus records are the best available OCLC records at the time of order.	annual subscription	\$ 1,080.00	N/A
<b>EOCR-Plus</b> Tier 00		\$ 1,550.00	N/A
All other tiers		\$ 2,065.00	N/A
<b>GobiAPI</b> Real-time API integration between GOBI orders and the library's local system, replacing EOCRs or GobiExport/EDI ordering.	annual subscription - We are pleased to offer VASCUPP members GobiAPI free of charge. The current annual subscription is \$1,575.00	\$ -	N/A
<b>E-ordering (orders transmitted from the ILS)</b> GOBI Library Solutions accepts electronic orders through GOBI and in a variety of external formats including EDIFACT, X12, email and formatted text.	no charge	\$ -	\$ -
<b>Electronic Status Reports / Order Responses</b> GOBI Library Solutions supplies electronic status reports/order responses in a variety of formats including EDIFACT, delimited, XML and HTML.	no charge	\$ -	\$ -



SERVICE	BILLING METHOD	US	UK
			<b>*pricing is indicative of pricing from our UK warehouse</b>
<b>Metadata Services for Print</b>			
<b>GOBI Metadata Service</b>			
For printed materials ordered on US or UK subaccounts, and based on a service package assembled to best meets local needs. Choice points are (1) whether to contract for CIP upgrades and (2) how to handle material for which no LC copy is available (no- hits). Pricing is cumulative based on selected options and billed per invoice line, with the cost applying to all items in the subaccount, regardless of type of record supplied for the individual title. GOBI Library Solutions reserves the right to charge a higher fee for more complex customization.			
LC-distributed full/core/CIP record as available; no record for non-hits	per invoice line	\$ 1.21	£0.88
LC-distributed/core/CIP record as available; no record for non-hits; add CIP upgrades	per invoice line	\$ 1.82	£1.32
LC-distributed/core/CIP record as available; CIP upgrades; Provisional records for non-hits	per invoice line	\$ 2.15	£1.60
LC-distributed/core/CIP record as available; CIP upgrades; Provisional-Plus for non-hits	per invoice line	\$ 4.24	£2.59
LC-distributed/core/CIP record as available; CIP upgrades; Full Records for non-hits	per invoice line	\$ 6.61	£4.57
<b>GobiShip Records</b>			
GobiShip records are brief MARC records conveying limited acquisitions, invoicing and pricing data. MARC Enrichment cannot be provided with GobiShip records, and they cannot be provided for e-books. These MARC records can have customizations applied.	annual subscription	\$ 825.00	N/A
<b>Metadata Service for E-books</b>			
<b>MS Digital</b>			
Provides support for e-books ordered & invoiced as individual titles on a designated e-book subaccount and e-books ordered & invoiced as an e-book collection. GOBI Library Solutions e-book records conform to PCC standards, contain site-specific URLs, and can be customized to meet various bibliographic and local data requirements.	per invoice line	\$ 2.42	N/A
<b>OCLC Plus Cataloging Services for Print and eBook</b>			
Libraries may choose to select one of our OCLC Plus services which provide records from OCLC, which are then upgraded for the library as needed. These services, offered at the Basic, Bronze, Silver, and Gold levels, are priced with an annual subscription and all but the Basic service carry an additional per-title fee. Additionally, for all of the OCLC Plus cataloging services, customers may opt to have GOBI Library Solutions alert OCLC to set holdings for the library at no additional cost.	GOBI Library Solutions is pleased to offer a 20% discount off of our current 2019-2020 print OCLC Plus cataloging services.Quote upon request.	GOBI Library Solutions is pleased to offer a 20% discount off of our current 2019-2020 print OCLC Plus cataloging services.Quote upon request.	N/A

OCLC Plus Basic: At point of purchase, the best OCLC record available to GOBI Library Solutions (at the time the ordered item is processed) is delivered to the library. At that time, the library's holdings are set in OCLC.

OCLC Plus Bronze: At point of purchase, the best OCLC record available to GOBI Library Solutions (at the time the ordered item is processed) is delivered to the library. If only a brief OCLC or non-LC CIP is available, a GOBI Library Solutions' Provisional record is built from the brief record, and is therefore supplied. Available LC CIPs are upgraded to full level.

OCLC Plus Silver: At point of purchase, the best OCLC record available to GOBI Library Solutions (at the time the ordered item is processed) is delivered to the library. If only a brief OCLC or non-LC CIP is available, a GOBI Library Solutions' Provisional Plus record is created from the brief record and is supplied to the library. Provisional Plus records contain authorized headings, including series, full call number and at least one subject heading. Available LC CIP's are upgraded to full level.

OCLC Plus Gold: 100% full records for all titles, including the best available OCLC record or an LC record upgraded to a full record by GOBI Library Solutions' in-house cataloging team.

SERVICE	BILLING METHOD	US	UK
			*pricing is indicative of pricing from our UK warehouse
<b>Metadata Service for Medical (Print)</b> Delivers appropriate medical records for print or e-books to customers. Choices are similar to the Metadata choices outlined above. Enhanced LC/NLM and Provisional+ records contain full LC and NLM classification as well as appropriate LC and MeSH subject headings. Pricing is cumulative based on selected options, with the cost applying to all items in the subaccount, regardless of type of record supplied for the individual title.			
Enhanced LC/NLM records; no record for non-hits	per invoice line	\$ 3.63	£4.37
GOBI Metadata Service for Medical (Enhanced LC/NLM records; Provisional records for non-hits)	per invoice line	\$ 3.96	£4.81
GOBI Metadata Service for Medical (Enhanced LC/NLM records; Provisional-Plus for non-hits)	per invoice line	\$ 7.26	£8.74
<b>Metadata Service for Medical (E-books)</b> Medical for E-books	per invoice line	\$ 7.26	N/A
<b>OCLC Plus Cataloging Service for Medical (E-books)</b> Medical for E-books	annual subscription/per invoice line	Quote available upon request	N/A



**Headquarters**  
Contoocook,  
NH, U.S.A.

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# **Response to RFP # LBS-1072**

## **Monographic Services**

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**RFP # LBS-1072**

**Monographic Services**

March 4, 2020

2:00 p.m. EST

This proposal responds to RFP # LBS-1072 for Monographic Services. GOBI Library Solutions' (formerly YBP Library Services (YBP)) is a division of EBSCO Information Services, a wholly owned subsidiary of EBSCO Industries, Inc.



# ***REQUEST FOR PROPOSAL***

## ***RFP# LBS-1072***

**Issue Date:** January 30, 2020  
**Title:** Monographic Services  
**Issuing Agency:** Commonwealth of Virginia  
James Madison University  
Procurement Services MSC 5720  
752 Ott Street, Wine Price Building  
First Floor, Suite 1023  
Harrisonburg, VA 22807

**Period of Contract:** From Date of Award Through One Year (Renewable)

**Sealed Proposals Will Be Received Until 2:00 PM on March 4, 2020 for Furnishing The Services Described Herein.**

*SEALED PROPOSALS MAY BE MAILED, EXPRESS MAILED, OR HAND DELIVERED DIRECTLY TO THE ISSUING AGENCY SHOWN ABOVE.*

All Inquiries For Information And Clarification Should Be Directed To: LeeAnne Beatty Smith, Buyer Senior, Procurement Services, [smith2LB@jmu.edu](mailto:smith2LB@jmu.edu), 540-568-7523, not later than five business days before the proposal closing date.

**NOTE: THE SIGNED PROPOSAL AND ALL ATTACHMENTS SHALL BE RETURNED.**

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

Name and Address of Firm:

Yankee Book Peddler, Inc. dba: GOBI Library  
Solutions from EBSCO

999 Maple Street

Contoocook, NH 03229

Date: March 4, 2020

Web Address: <https://gobi.ebsco.com>

Email: [bidadmin@ybp.com](mailto:bidadmin@ybp.com)

By:



(Signature in Ink)

Name: Kate Hartnett

(Please Print)

Title: Vice President, Finance &  
Accounting

Phone: 1 603-746-8808

Fax #: 1 800 451 8667

ACKNOWLEDGE RECEIPT OF ADDENDUM: #1 \_\_\_\_\_ #2 \_\_\_\_\_ #3 \_\_\_\_\_ #4 \_\_\_\_\_ #5 \_\_\_\_\_ (please initial)

SMALL, WOMAN OR MINORITY OWNED BUSINESS:

☐ YES; ☒ NO; *IF YES* ⇒ ☐ SMALL; ☐ WOMAN; ☐ MINORITY *IF MINORITY* ☐ AA; ☐ HA

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

## TABLE OF CONTENTS

### Request for Proposal - Signed

<b>Pages 1-11:</b>	<b>A. Scope of Service</b>
<b>Pages 1-3:</b>	<b>A.1</b> Firm Orders on a one-time basis
<b>Pages 3-5:</b>	<b>A.2</b> Approval orders according to profiles established by each institution
<b>Pages 5-6:</b>	<b>A.3</b> Standing orders
<b>Page 6:</b>	<b>A.4</b> Rush orders
<b>Pages 6-8:</b>	<b>A.5</b> Demand-Driven or Patron-Driven
<b>Pages 8-9:</b>	<b>A.6</b> Evidence-based Acquisition
<b>Pages 10-11:</b>	<b>A.7</b> Other
<b>Pages 11-14:</b>	<b>B. Materials Covered</b>
<b>Pages 11-13:</b>	<b>B.1</b> Format
<b>Page 13:</b>	<b>B.2</b> Subject coverage and <b>B.3</b> Geographic area
<b>Pages 14:</b>	<b>B.4</b> Language and <b>B.5</b> Publisher type
<b>Page 14:</b>	<b>B.6</b> Describe any barriers to providing access to eBook content or metadata...
<b>Pages 15-16:</b>	<b>C. Ordering</b>
<b>Pages 15-16:</b>	<b>C.1</b> Describe all possible methods and workflows available for selection and ordering...
<b>Pages 17-19:</b>	<b>D. Fulfillment and Delivery</b>
<b>Page 17:</b>	<b>D.1</b> Fulfillment Rates and <b>D.2</b> Shipping method
<b>Pages 17-18:</b>	<b>D.3</b> Packaging, <b>D.4</b> Ability to tailor shipments to individual institutions...
<b>Pages 18-19:</b>	<b>D.5</b> Ability to check library holdings for duplicate orders
<b>Pages 19-21:</b>	<b>E. Claims &amp; Cancellations</b>
<b>Pages 19-21:</b>	<b>E.1</b> Describe all possible methods and workflows available for claiming of materials...
<b>Page 21:</b>	<b>F. Returns</b>
<b>Page 21:</b>	<b>F.1</b> Detail the contractor's return policy
<b>Pages 22-23:</b>	<b>G. Invoicing &amp; Payment</b>
<b>Pages 22-23:</b>	<b>G.1</b> Invoice Delivery Methods
<b>Pages 23:</b>	<b>G.2</b> Payment Methods and <b>G.3</b> Ability to tailor invoices to individual institution needs
<b>Pages 24-32:</b>	<b>H. Additional Services</b>
<b>Pages 24-26:</b>	<b>H.1</b> Cataloging
<b>Pages 26-29:</b>	<b>H.2</b> Shelf-Ready
<b>Pages 29-32:</b>	<b>H.3</b> Other
<b>Pages 32-33:</b>	<b>I. Customer Service</b>
<b>Pages 32-33:</b>	<b>I.1</b> Describe the availability and experience of staff designated to respond to customer...
<b>Page 33:</b>	<b>I.2</b> Describe mechanism for escalating issues
<b>Pages 33-43:</b>	<b>J. Vendor Catalog and Order System</b>
<b>Pages 34-38:</b>	<b>J.1</b> System Functionality
<b>Pages 38-39:</b>	<b>J.2</b> Ability to interface with third-party library systems
<b>Pages 39-40:</b>	<b>J.3</b> Customization
<b>Pages 40-41:</b>	<b>J.4</b> Collection development tools
<b>Pages 41-43:</b>	<b>J.5</b> Reporting
<b>Pages 43-47:</b>	<b>K. Set up and implementation</b>
<b>Pages 43-44:</b>	<b>K.1</b> Typical implementation timeline and proposed project plan
<b>Pages 44-45:</b>	<b>K.2</b> Institutional level staff roles necessary for implementation
<b>Page 46:</b>	<b>K.3</b> Approximate number of staff hours, broken down by staff role, necessary...
<b>Pages 46-47:</b>	<b>K.4</b> Contractor Support during the implementation process
<b>Page 47:</b>	<b>K.5</b> Best practice recommendations for implementations

**Pages 48-49:** \_\_\_\_\_ **L. Training and Documentation**  
**Page 48:** \_\_\_\_\_ **L.1** Describe available documentation for user support and system administration...  
**Pages 48-49:** \_\_\_\_\_ **L.2.** Describe on-site training sessions taught by contractor personnel available...  
**Page 49:** \_\_\_\_\_ **L.3** Describe online training sessions taught by contractor personal available...  
**Pages 49-50:** \_\_\_\_\_ **M. Trial and Samples**  
**Page 49:** \_\_\_\_\_ **M.1** The Contractor shall provide VASCUPP members trial access to applicable systems  
**Pages 49-50:** \_\_\_\_\_ **M.2** The Contractor shall provide samples...

**Additional Information Attached as Exhibits to the Statement of Needs:**

**Exhibit #1, *eSupplier Platforms Available in GOBI***

**Exhibit #2, *Order Workflow Flow-Chart***

**Exhibit #3, *GOBI Management Information Reports***

**Exhibit #4, *Transition Timeline***

**Exhibit #5, *Sample Packing Slip***

**Exhibit #6, *Print Invoice***

**Exhibit #7, *eBook Invoice***

**Exhibit #8, *Sample MARC Record***

**Exhibit #9, *Sample Spine Labels***

**Exhibit #10, *GOBI Library Solutions' KPIs***

**Exhibit #11, *GOBI Library Solutions' Technical Services Price List***

**Additional Information Included in GOBI Library Solutions' Response to RFP #LBS-1072:**

**Appendix #1, *Statement of Company Experience***

**Attachment A, *Offeror Data Sheet***

**Attachment B, *Small Business Plan***

**Appendix #2, *VASCUPP Sales Report January 2019 to January 2020***

**Appendix #3, *Pricing Schedule Section X***

VASCUPP seeks a Contractor to provide print and electronic monographic services. Offerors shall describe in detail their approach to each of the following items:

Thank you for providing us with the opportunity to respond to your request for offer for the Supply of Monographic Services.

GOBI Library Solutions, through our current partnership, understands that VASCUPP's eBook strategy includes increasing access to Demand Driven Acquisition (DDA) in combination with e-preferred approval plan/firm order purchasing and Evidence-based Acquisition programs, and that selective collection purchases will continue to drive the increased eBook acquisition.

GOBI Library Solutions will help VASCUPP libraries meet their vision and goals of providing outstanding learning environments and programs that lead to excellent outcomes for graduates. In addition, we understand the wishes to undertake high-impact research and development in selected areas, at the highest standards, reinforcing the college and universities fundamental values and securing significant commercial and practical benefits for the community and for their partners.

[Print Firm Orders](#)

GOBI Library Solutions' believes that the breadth of our publisher coverage, as well as the flexibility of our subject profiling, allows libraries to establish and maintain more predictable, precise, consistent, and responsive material than other vendors can offer. In order to better meet the rapidly evolving information and workflow needs of academic libraries, GOBI Library Solutions has developed close working relationships with virtually all major English language academic and research publishers around the globe; today we work with more than 66,000 publishers in 103 countries to supply materials on a firm order basis.

GOBI Library Solutions is proud of our ability to secure books in a timely fashion from any publisher that will sell to a distributor. We regularly revise our publisher coverage and continue to add publishers based on our own industry research and at customer request. Should we not already work with a publisher, we will consider them for inclusion at the Library's request, [REDACTED]

GOBI Library Solutions pulls inventory from our state-of-the-art

### A.1 Scope of Service, Firm Orders on a one-time bases- Continued

distribution facilities and partners to provide unparalleled firm order service to our library customers.

GOBI®, our online support system, is a highly valuable index of more than 17.3 million titles and offers powerful querying and search capabilities, and a fast, efficient way to select and order print and electronic titles. Our range of services include multiple purchasing options including one-time Firm Order, Standing Orders, Approvals and Out of Print. Daily database updates include changes to bibliographic information, stock, and pricing details which help librarians to make GOBI part of their acquisitions and cataloging workflows.

Additional digital content is constantly being added to our online database and workflow management system, GOBI, with "Library Availability" clearly noted on the eBook record. These electronic book titles are linked via ISBN to their print counterparts on an on-going basis to allow for easy navigation and duplication control between the print and electronic versions. The Library can also preview many electronic titles.

#### eBook Firm Orders

GOBI Library Solutions partners with many leading ebook aggregators and publishers to offer the most comprehensive digital and print discovery and fulfillment services available from any vendor. Libraries can choose to acquire ebooks as single titles, via an approval plan, an ebook collection, or as standing orders. Currently, we offer more than two million ebook titles through our partnerships with EBSCO and ProQuest (eBook Central). We also offer Publisher Direct ebooks and packages from Cambridge, Duke University Press, Oxford, Project Muse, Sage Knowledge, Taylor & Francis, Wiley, World Scientific and others, and will continue to expand these offerings as publishers expand their econtent distribution options. Please refer to [Exhibit #1, eSupplier Platforms Available in GOBI](#).

Each of these partners has license limits on such factors as simultaneous users, interlibrary loans, course management systems, and reserves and strategies for perpetual access and preservation. These licenses are available through the aggregator/publisher directly and can be modified to accommodate any library. GOBI Library Solutions works with our aggregator and publisher partners to secure the most mutually satisfactory, financially sustainable, and user-friendly license terms for all parties.

Each supplier from whom a library may choose to purchase will offer varying levels of access models. Depending on the access model and ebook supplier chosen, the digital rights management (DRM) will also vary.

Access models include:

- 1 User Model
- 3 User Model
- Unlimited/Multi-user Model/Unlimited User DRM Free
- Concurrent Access/Non-Linear Lending Model

## A.1 Scope of Service, Firm Orders on a one-time bases- Continued

1 User, 3 User and Unlimited/Multi-User Models refer to the number of users that can access a given title simultaneously. The Concurrent Access/Non-Linear Lending Model allows a set number of “loan instances” per year for a given title. Each time the title is accessed indicates a loan instance. In this model multiple users may access a given title simultaneously, but each user access is a loan instance.

### 2. Approval orders according to profiles established by each institution

GOBI Library Solutions has been working with libraries and providing expert assistance with setting up and maintaining subject profiles for more than 25 years. Our flagship Profiling Advantage Program is flexible and can be highly customized both by subject and non-subject parameters. We offer a combination of publisher-based and subject-based approaches in a plan. All plans can be for auto-shipped books (or auto-activated books in the case of ebooks), notification slips, or a mix of the two.

From our initial onsite meeting, we write a draft profile and submit it to the Library for acceptance or revisions. The library’s Collection Development Manager generally gets the library’s profile entered into our system within five days of acceptance by the library staff. One week is needed for the profile to produce books or slips.

Every library profile has up to five (5) components, allowing for greater precision and accuracy:

#### *1. A list of publishers to be included in or excluded from the plan*

We have extremely precise control in managing what you receive from publishers. Individual presses can be included for book coverage, slip coverage, or can be blocked entirely. In addition, libraries have the option to receive all books for particular imprints, regardless of the subject and non-subject elements of the profile.

#### *2. Subject specifications*

Approval and Title Notification Slip profiles are flexible and precise. Profiles can be written in any one of the Library of Congress (LC), National Library of Medicine (NLM), or Dewey Decimal (DDC) classification systems. Our profiling methodology allows us to precisely describe each library’s individual collection-development interests. New terminology, specialized/newly emerging academic fields, and interdisciplinary subjects can be easily incorporated into the profile.

#### *3. Interdisciplinary specifications as appropriate*

For topics such as Environmental or Ethnic Studies where specification of LC classes is unwieldy, the profile is enhanced by narrative instructions to ensure coverage of interdisciplinary studies as appropriate to your collection. In addition, we can create multiple profiles by discipline, allowing for differing subject and non-subject parameters, and narrative instructions within sub-profiles.

## A.2 Scope of Service, Approval orders according to profiles established...-Continued

We could use fund codes to indicate that some classes are split between two disciplines, for example, if both Communication Disorders and Biology shared a plan; or we could split them into two separate plans, one GOBI Library Solutions profile for each discipline.

### 4. *Non-subject instructions*

Titles can be included, excluded (blocked) or limited to slip coverage based on your specific non-subject parameters. GOBI Library Solutions offers an extensive list of non-subject descriptors, and these may vary as needed from subject to subject. [REDACTED]

[REDACTED]

[REDACTED]

[REDACTED] Book-in-hand selection by our bibliographers ensures flexibility and accuracy of the profile content.

These four parts are integrated into a unified profile for each library. Typically, we set up one profile for a library, which can be library-assigned by fund codes, and can be set up into as many or as few categories as are required for appropriate distribution of books and slips. Alternatively, we can establish different profiles for each discipline. In this case, multiple subaccounts to accommodate the different profiles would be built on the library's assigned base account.

### 5. *A list of series to be included in or excluded from the plan*

In the same manner as the list of publishers, a list of series can be included in or excluded from the plan.

A unique characteristic of our approval services is the ability to incorporate series-level instructions to a high degree of detail. GOBI Library Solutions blocks from approval shipments those volumes from series the library has on standing order, either with us or with other vendors. Alternatively, we can set up coverage for particular series on approval, so that the approval plan's discount and returnability apply to the series.

Our ebook approval service provides the same level of profiling detail and flexibility that has been the trademark of our print approval service for more than 40 years. eBooks can be included in slip plans or approvals, or they are retrievable by doing subject searches of the GOBI database, using LC class, subject headings, and interdisciplinary descriptors. Subject profile alerts can also include ebooks.

In addition, there are five types of approval profiles a library can set up. All plans can be for auto-shipped books (or auto-activated books, in the case of ebooks), notification slips, or a mix of the two.

## A.2 Scope of Service, Approval orders according to profiles established...-Continued

- 1.) Print Only. This plan can be either cloth-preferred or paper-preferred, and ebooks are excluded.
- 2.) E-Only. This is the newest option made possible by our ebook approval service. Print books are excluded. A customer utilizing e-only approval plans should expect approximately 50% coverage in ebook format for our approval output since only half of our publishers simultaneously release an ebook version with a new print edition.
- 3.) Mix of Print Preferred and E-Preferred. With this plan, the library may determine areas of the profile they would like to be supplied with print titles only, while other portions of the plan may allow for ebooks. We deliver the preferred binding whenever possible. For the print portion, the library can elect either cloth-preferred, or paper-preferred.
- 4.) E-Preferred. With this plan, we send the first available version. We deliver an ebook whenever possible, but a print book is acceptable. If a print book is supplied, it will be either cloth-preferred or paper-preferred.
- 5.) eBook AutoProfiling/AutoSlip Plans. This type of plan is used for ebook versions not known at the time of original profiling, and for ebooks older than two publication years ago. The library has the same choices as they do under our other plans (all suppliers, particular suppliers, first version). This plan will deliver ebook slips only, no physical books.

## 3. Standing orders

- a. Numbered monographic series
- b. Unnumbered monographic series
- c. Volume sets issued over a period of time

GOBI Library Solutions' standing orders (serials) department provides regularly and irregularly published monographic series to libraries. We manage more than 70,000 active series titles. Among them are numbered and unnumbered monographic series, sets-in-progress, and annuals. The database of series titles is available through our online database GOBI. GOBI data features rich bibliographic information, including the ability to display all volumes of a series, and numerous reporting tools. It comprises a mix of series handled through our Approval buying plus many other titles from non-approval presses. Many new GOBI Library Solutions serial records are for irregular editions that other vendors typically do not offer.

GOBI Library Solutions will ship a multi-volume set in one shipment if the set is ordered under one ISBN. If each volume of the set has a separate ISBN, they would be sent out as they are received, with the next available shipment.

Additionally, GOBI Library Solutions offers an eSeries Standing Order Service that models our current workflow for print Standing Orders. We currently offer 275 eSeries from eight select publishers with ebook platforms (such as Cambridge, CRC Press, Elsevier Science, CQ Press,



### A.3 Scope of Service, Standing Orders-Continued

Oxford UP (OUP), John Wiley and Sons and Taylor & Francis). Currently eSeries is not offered through ebook aggregators. In time, we will add to this initial list based on researching customer requests and analyzing data of the ebook feeds from our publisher partners and aggregators.

To view a list of available titles in GOBI, click the Search menu, and under the Search Continuations subheading, click the Titles and Place Orders link. On the search page, click the "eSeries available" button for your format preference, and click Search. GOBI will retrieve both print and eSeries records for all series available in electronic format. Filter the results to show eSeries only.

eSeries must be ordered on a dedicated eSeries sub-account. Library members may contact their Customer Service Representative or Collection Development Manager to set this up. Once the sub-account is established, eSeries may be ordered just like a print series in GOBI. Standard duplication control across all accounts will be an integral part of this new service and customers can allow (or not) for ebook and print book duplication at the sub-account level.

For all volumes of any series, individual monographic records can be supplied via GOBI Library Solutions' eBook Metadata Service. Regarding series where individual volumes lack distinctive titles, if the library does not want individual monographic records supplied, we recommend isolating the series on a separate sub-account.

eSeries titles are offered via the unlimited user access model.

### 4. Rush orders

GOBI Library Solutions provides free ground shipping to US customers for all Rush orders placed on GOBI. Rush delivery charges for next-day or second-day delivery are standard UPS charges for the delivery method selected.

For titles listed in GOBI as "RUSH Available", the average order turnaround time is between three (3) and four (4) business days. Orders placed before noon EST will ship the same day, whereas orders placed after noon will ship the next day.

We furnish email confirmation with UPS tracking information for the rush delivery that will arrive in specially marked packages. As with all GOBI orders, GOBI Library Solutions' duplication control and transaction details apply.

Rush orders are sold at a 10% discount. The regular discount exceptions, as outlined in the Pricing Schedule-Section X.

### 5. Demand-Driven or Patron-Driven

GOBI Library Solutions offers a Demand-Driven (DDA) program through our online database, GOBI. Currently we work with EBSCO and ProQuest (eBook Central) to offer a wide range of DDA eligible titles.

### A.5 Scope of Service, Demand-Driven or Patron Driven-Continued

Some of the key features in working with GOBI Library Solutions for a DDA Program include:

- Duplication control against other purchases made through GOBI's DDA program
- Duplication control against purchases made outside GOBI on the basis of library's holdings via ISBN import
- Customized discovery
- MARC records
- Electronic invoicing
- DDA activity visible in GOBI
- Acquisition Workflow Support
- Ability to manually select titles in GOBI and add to existing DDA when needed

GOBI Library Solutions has a long history of working closely with many thousands of publishers, aggregators and leading content intermediaries from around the world. These partners recognize that our parent company, EBSCO, as well as GOBI Library Solutions, have been the leading channel for the sale and delivery of ebooks to academic libraries for many years. Our external partners work with our Content Licensing Teams and our Publisher Relationship Managers whose very existence is to ensure the relationships and networks we manage within the publishing industry result in the very best possible experience for our customers and one of the most comprehensive online catalogs for academic books in the world.

Extensive support is provided in setting up the library's account. A GOBI Library Solutions project team will support the setup of the library's DDA profile. This team will include a Collection Development Manager, a Customer Service Representative, and other technical services personnel. Your GOBI Collection Development Manager (CDM) will initiate an onsite meeting at your library to capture any requirements and preferences for the set-up of a DDA profile(s). From there we write a draft profile which will be used to drive what content will be identified for the library's DDA program. The DDA-profile is highly customizable and the Library's assigned CDM will review profile drafts with library staff until they are happy with the set up. We generally enter the DDA-profile into our system within five working days of acceptance by the library.

#### Consortial DDA

By reviewing the historical acquisitions data of the participating libraries to determine the top publishers from whom the consortium is acquiring content, we can use this data to inform libraries of their collecting patterns and to select an initial group of publishers with whom to work. This is crucial because negotiations will be required with each of the publishers. To keep these negotiations manageable, and to get a project off the ground in a reasonable timeframe, the consortium should select a small set of publishers to initially work with.

GOBI Library Solutions is in a unique position to develop consortial DDA services because we handle both print books and ebooks. Although VASCUPP's DDA project will be for ebooks only, it is important to emphasize that only a small percentage of total publisher output is available via DDA and in electronic format. We can ensure comprehensive coverage for the individual

### A.5 Scope of Service, Demand-Driven or Patron Driven-Continued

libraries and prevent duplication so that individual VASCUPP libraries do not purchase titles acquired at the consortial level. VASCUPP will want to be made aware of titles being published by the key publishers in the DDA project that are not part of their DDA discovery pool of titles. GOBI Library Solutions can work with the consortium to identify these titles and determine if and how they should be purchased. Options include:

- consortial-level acquisition of an eCollection,
- consortial-level acquisition as a print collection or hand-picked print titles (particularly if the title is not available as an ebook)
- acquisition on approval by individual libraries (if the title matches their GOBI Library Solutions profile) or
- title notification sent to individual libraries (again, if the title matches their profile).

Drawing on our experience in developing innovative services for libraries, GOBI Library Solutions will take the lead in ensuring that the value of our services continues.

### 6. Evidence-based Acquisition

VASCUPP member libraries may consider, as a complement to our Demand-Driven Acquisitions solution, our Evidence-Based Acquisitions program, which provides patrons broad access to proven, high-value content from top academic publishers that is made available as it is published. GOBI Library Solutions has partnered with Taylor & Francis, and Wiley to offer Evidence-Based Acquisitions to our customers. These partnerships allow libraries to receive the high-quality content from top academic publishers with the value-added workflow support of GOBI Library Solutions. Each library's dedicated representative will work closely with staff and publisher partners to identify the content and size of the program needed.

Once determined, GOBI Library Solutions will manage the order on behalf of the library. Working with GOBI Library Solutions provides customers with customizable MARC Records, visibility within GOBI of the titles within the EBA program, duplication control, end-of-term assistance with identifying titles to be selected for perpetual access and removal of those titles no longer available.

Through our partnership with Taylor & Francis and Wiley, GOBI Library Solutions supports the following services:

- Title negotiation
- Collection management and selection
- De-duplication
- Delete Files
- Enhanced Usage Reports
- Full cataloging services
- Pricing negotiation
- Invoicing
- Reporting and selection

## A.6 Scope of Service, Evidence-based Acquisition-Continued

- Renewal

There are a number of key advantages of choosing GOBI Library Solutions to manage your EBAs. Most importantly:

- A library can use GOBI to provide enhanced data and analysis to assist in the selection of titles for an EBA program under consideration. We work with our publisher partners to integrate usage and turnaway data in the collection analysis we provide, upon request.
- EBA pricing via GOBI is the same as the publisher direct price – libraries can choose to receive a quote from their GOBI Library Solutions representative or negotiate directly with their local publisher representative. We will always liaise with the local publisher team to ensure that the library receives an accurate and competitive quote.
- Enhanced metadata, such as DDC, LC class, LCSH, is included in GOBI reports for title selection.
- GOBI de-duplicates against holdings including titles in the Library's DDA pool. Titles added to the EBA pool will not be subsequently added to the DDA pool. GOBI can also help remove titles from DDA as they are added to EBA. This allows libraries to maximize the benefits of both user-driven models, and provides a solution to balance the various models, including EBA, DDA and approval plans.
- GOBI Library Solutions provides high-quality customizable MARC discovery records for titles in the EBA pool.
- GOBI provides high-quality, in-depth usage statistics provided at regular intervals throughout the EBA term.
- GOBI Library Solutions provides enhanced analysis and reporting to assist with title selection at the end of an EBA. This goes beyond the usage data provided by publishers.
- GOBI Library Solutions includes all EBA content in the Enhanced Usage Report including content added late in the program.
- GOBI Library Solutions assists in the removal of MARC records when the EBA program concludes (non-purchased titles).
- GOBI Library Solutions offers personalized and consistent customer service backed up by our collection development expertise.
- GOBI Library Solutions provides support for any EBA term, including 6-month, 12-month or rolling EBA periods.

## A. Scope of Service-Continued

### 7. Other

#### Awards Program

Our Adult Awards Program covers prominent awards such as the Pulitzer Prizes, National Book Awards, and National Book Critics Circle Awards, as well as selected specialized awards including the Hugo Awards, for science fiction, and the Edgar Awards, for mysteries. GOBI Library Solutions will also cover Canada's Giller Prize and Governor General's Award. Our UK division covers prominent British and Irish awards, such as Whitbread, Booker, and the International IMPAC Dublin Literary Award.

The Adult Awards Program via GOBI Library Solutions is an efficient and automatic way for academic libraries to acquire award-winning books. This program complements our Children's Awards Book Program, a service popular for many years with libraries who have relied upon it to acquire important children's books, such as Newbery and Caldecott winners.

#### Out of Print Services

GOBI Library Solutions offers two options when titles are statused out-of-print (OP) or out-of-stock-indefinitely (OSI).

**OP Choice**, our standard out-of-print fulfillment service, gives librarians choice in defining out-of-print book search parameters. With your prior consent, GOBI Library Solutions will automatically re-source ordered titles directly from a vendor such as Alibris, a leading provider of such material. Customers define out-of-print book search parameters for elements including price, edition, imprint, format and condition. Alibris sources the books from its international network of some 14,000 booksellers in 35 countries, or from its own inventory. GOBI Library Solutions then includes the books in the regular customer order shipments, ensuring that the OP/OSI orders get the same quality review, cataloging, physical processing, and collection management services that all other orders receive.

If the Library has indicated it is willing to consider a near, but not perfect match, Alibris will query GOBI Library Solutions when a near match is found. GOBI Library Solutions Customer Service will in turn query you. GOBI Library Solutions sells the book to the library at Alibris's list price plus a 15% service fee, with a \$10 per book minimum and a \$25 maximum.

Alternatively, through **BookZone**, libraries can see in real time current stock and condition information for hard-to-find titles from the Alibris Monsoon network of more than 14,000 online independent booksellers. This service allows libraries to locate and acquire their own copies of out-of-print and out-of-stock books in very good, like new or excellent condition directly through our online database GOBI and all within an existing GOBI workflow. It is a fast and convenient way for libraries worldwide to purchase the titles needed for their patrons. Titles ordered through BookZone on a dedicated sub-account are invoiced by GOBI Library Solutions (at Alibris's list price, less 5%, plus service fee; customers outside the US and Canada will also

#### A.7 Scope of Service, Other-Continued

incur a freight charge per title) and shipped from Alibris. A GOBI user needs authorization to order these non-cancellable titles.

#### B. **Materials Covered-** Describe the materials being offered, including but not limited to:

##### 1. **Format**

GOBI Library Solutions provides formats of any type to our customers so long as they can be obtained from any one of the more than 66,000 publishers (including both firm order and approval publishers) who distribute material to wholesalers in North America and the UK.

GOBI Library Solutions uses the strength of its relationships with publishers, as well as electronic bibliographic resources, to deliver esoteric titles from hard-to-locate publishers. Our Publisher Unit is dedicated to finding any title and will use all available resources to identify the source, and status of hard-to-locate publishers and books. We are committed to delivering any title, or if unavailable, providing the current status of the order. Fulfillment is naturally slower in obtaining hard-to-locate titles.

##### a. **Print**

##### i. **Cloth**

Through GOBI, customers have access to 3,850,600 cloth titles.

##### ii. **Paper**

Through GOBI, customers have access to 10,374,266 paper titles.

##### b. **Electronic**

GOBI Library Solutions works with 24 leading publishers and aggregators to provide a wide variety of choices for ebook access. We offer more than two million ebooks through our database GOBI, a robust acquisition and collection development tool. Acquiring ebooks through GOBI Library Solutions is ideal for libraries wishing to streamline and integrate their workflows for acquiring print and electronic content. Recent additions to our ebook platform ordering options include Taylor & Francis, Brill, and Bloomsbury eBooks. Please refer to [Exhibit #1- GOBI eSupplier Platforms Available in GOBI](#).

##### i. **Single user**

Agreed.

##### ii. **Multiple users**

Agreed.

## B. 1 Materials Covered, Format- Continued

### iii. Licensing

GOBI Library Solutions will work with our aggregator and publisher partners to secure the most mutually satisfactory, financially sustainable and user-friendly license terms for all parties. Each aggregator and publisher has a standard license for access to material on their hosting platform. These licenses are available through the aggregator/publisher directly. The standard license may be modified to accommodate the member library.

### iv. Notification of access

GOBI Library Solutions provides automated (emailed) Notification of Access (NOA) for ebooks purchased via your GOBI Library Solutions ebook sub-accounts(s) each day. We also provide ebook cataloging records that can serve as access verification. NOAs include in the Subject Line the name of the eBook Supplier, Customer Account Number and Customer Name. For each ebook ordered, GOBI Library Solutions will include the title, ISBN and URL link to the ebook.

## c. Media

### i. DVD

### ii. CD

CDs and DVDs are occasionally included with a print publication, though GOBI Library Solutions does not have a comprehensive in-house solution for handling media formats separately.

### iii. Streaming

#### a) Local

#### b) Hosted

GOBI Library Solutions does not currently handle streaming content.

We are able to supply almost every type of material supplied by publishers on a firm order basis with the following exceptions for Standing Orders and Approval Plan services:

1. Subscriptions: GOBI Library Solutions will only handle items when the publisher bills and ships issues individually. This excludes most subscription items.
2. Undersized books: (less than 3.5" on either side) and less than five-year-old reprints.
3. Ephemeral material

## B. 1 Materials Covered, Format- Continued

4. Non-Book Formats: Loose-leaf binders, calendars, instruction manuals, series that include pocket parts, videos, microfiche/film, DVD's, sheet music and audio books, and/or CDs that include license agreements are not available.
5. Memberships: Any Association, Institute or Society that requires GOBI Library Solutions to become a member in order to purchase its publications will not be included in our Standing Order coverage.
6. Untrackable Series: Series that constantly change publishers and series that are published simultaneously by more than one publisher will not be available through GOBI Library Solutions on standing order.
7. Blanket Orders by Publisher: GOBI Library Solutions does not accept blanket orders for all publications from one publisher. Each series title would need to be ordered separately. If a customer is interested in a blanket order for a publisher within the approval universe, it is possible to have a "send all" instruction at the imprint level on an approval plan subaccount. This would result in books being sent for any titles profiled on approval from the specified imprint.

## 2. Subject coverage

As a leading provider of books to academic/research libraries, we are able to provide extensive coverage in all subjects including Applied and Social Sciences, Art, Business, Communications, Education, Environmental Studies, Health Sciences, Law, Nursing and Technology.

Book approval plans for major research libraries are typically based on wide subject coverage—including traditional subjects, newer interdisciplinary topics, and area studies fields—and wide publisher coverage from North America, Europe and the UK, and other world regions publishing in English—encompassing monographs and other scholarly works, scientific and technical books, trade books, small press titles, and some professional associations and societies. GOBI Library Solutions purchases the entire English-language scholarly output of our identified approval publishers. Collectively, the output of our approval publishers accounts for close to 100% of the publications of interest to most academic libraries. Each profile's range of materials for inclusion is based on a mutual determination of the appropriate presses and subject coverage for the library.

## 3. Geographic area

GOBI Library Solutions does not geographically limit firm orders. Together, our US and UK warehouses offer complete coverage of scholarly English-language titles from North America and the United Kingdom. We supply materials from Canada, Europe (Western and Eastern), Africa, Central America, South America, Asia and Australia. We will gladly research your orders to determine if we can supply them if they are from a country not identified above. Additionally, GOBI identifies many of these titles as alternate editions. For example, St. Martin's Press has US distribution arrangements for many Macmillan (UK) titles.



## B. Materials Covered-Continued

### 4. Language

Historically, GOBI Library Solutions has specialized in supplying English-language material; however, GOBI also contains a growing number of titles from non-English publishers worldwide. We offer approximately 5,000,000 titles in languages including: German, Spanish, French, Italian, Arabic, as well as others.

### 5. Publisher type

GOBI contains title records from English-language publishers worldwide. Types of publishers include academic, university press, professional/technical, trade, commercial, scholarly, medical, museum, university departments, personal authors, private corporations, government/non-profit agencies, small presses, societies/associations, symposia/conferences, and others.

### 6. Describe any barriers to providing access to eBook content or metadata from competitive publishers.

Possible ebook publisher licenses may prohibit the sale of ebooks to the United States. Please refer to the attached [Exhibit #1 - GOBI eSupplier Platforms Available in GOBI](#) for a list of ebook publishers/aggregators we currently work with who sell content to the United States.

GOBI Library Solutions has 24 eSuppliers, and our goal is to continue building our relationships with ebook aggregators and with publishers so that we can offer libraries and groups of libraries around the world the broadest choice for the econtent they will need to support their users regardless of distribution rights, platform, or pricing model.

We are actively engaged with several additional eSuppliers about adding their platforms as available options through GOBI. Many of these publishers are eager and willing to work with GOBI Library Solutions based on the number of libraries using GOBI and customer feedback. We hope in the coming months that we will have announcements, integration with publishers, and availability for GOBI users!

Our external partners work with our Content Licensing Teams and our Publisher Relationship Managers whose very existence is to ensure the relationships and networks we manage within the publishing industry result in the very best possible experience for our customers and one of the most comprehensive online catalogues for academic books in the world. All ebook licenses can be viewed in GOBI.

### C. Ordering

1. Describe all possible methods and workflows available for selection and ordering of materials, i.e., through vendor system, upload or Edifact transfer of orders from library system, API integration with library services platform, etc.

GOBI Library Solutions accepts mailed paper orders and electronic orders. We would encourage VASCUPP member libraries to use electronic ordering if possible in order to benefit from the greater efficiencies (speed of order entry and delivery) that this mode of ordering offers.

GOBI Library Solutions can handle electronic orders in any of the standard ILS output formats (BISAC, X12, EDIFACT) and also accepts electronic orders via:

- GOBI®, our browser-based online service
- GobiAPI (for Alma, Sierra, FOLIO and Kuali OLE customers)
- FTP
- machine-readable files attached to email messages
- formatted email messages containing formal orders in a consistent and unvarying layout
- fax (treated as non-electronic "paper" order)
- Telephone, by your dedicated Customer Service Representative

#### Through the Vendor System (GOBI)

If a library chooses to place orders through GOBI, orders are processed/acknowledged immediately. Orders are then passed through a filter where it is checked for [REDACTED]

Orders with special notes to the vendor are routed to an exceptions section of our order processing software, to be reviewed manually and acted upon as necessary, then released into the system.

[REDACTED]

After the open order is created, an additional duplication check is performed. Order information is then sent to the warehouse for fulfillment. (The aggregator/publisher receives the ebook purchase order, then provides access to the customer. The vendor then invoices GOBI Library Solutions and returns the purchase order acknowledgment to us).

GOBI orders can also incorporate the Library's local data [REDACTED]. Once the orders have been placed, we will begin processing them immediately. If a library wishes to record a copy of that order in its local system, GOBI Library Solutions can output Electronic Order Confirmation Records (EOCRs). [REDACTED]

### C.1 Ordering, Describe all possible methods and workflows available...-Continued

[REDACTED]

Please refer to [Exhibit #2](#), *Order Workflow Flow-Chart*.

#### Upload or EDIFACT Transfer

Libraries may also send orders from their local systems. GOBI Library Solutions accepts EDI orders from a wide variety of standard integrated library systems. Usually libraries will start with a bibliographic record in their local system to serve as a basis for that order.

Libraries can opt to download those records from GOBI using the GobiExport workflow. [REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED] When the file is loaded and the order record created, then the Library can send the order to GOBI Library Solutions from its local system.

#### GobiAPI- for Alma, Sierra, FOLIO and Kuali OLE Customers

GOBI Library Solutions offers a real-time integration process between GOBI and the library's local ILS system.

The API workflow eliminates the need to load files on the library and the vendor side, as once an order is placed in GOBI, we immediately transmit brief bibliographic and order data to the local system. If the ILS finds a match between the incoming data and an existing bibliographic record,

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED] The order process is completed within seconds and works equally well for single or multiple orders within GOBI.

Setup is a simple process. Upon receipt of an API key from the ILS, libraries work with their GOBI Library Solutions Technical Services Sales Representative. As with other workflow services, the final configuration details are documented in the library's GOBI Library Solutions Technical Specification.

For those member libraries using Sierra, the library needs to be running Sierra 2.3 or higher.

**D. Fulfillment and Delivery-** Describe possible mechanisms and workflows available for fulfillment of orders and delivery of materials, including:

**1. Fulfillment Rates**

**a. Percentage of orders filled**

90% of books are fulfilled within four to six weeks.

**b. Average delivery time**

Depending upon the services selected at the time of order, as well as in-stock status, delivery times can vary between two weeks up to 12 weeks. For example:

- If the book is in stock: our expected delivery times are 2-4 weeks from the order date.
- If the book is out of stock: our expected delivery times are 4-6 weeks depending on publisher availability.
- If the book is out of print: expected delivery is 6-12 weeks from the order date.
- Physical processing services can also add up to five days to the delivery time.

**2. Shipping method**

GOBI Library Solutions ships all books via UPS or common carrier. Inside delivery or to an alternate location is the responsibility of the carrier and can be facilitated by GOBI Library Solutions.

**3. Packaging**

**a. Packaging method and materials**

Orders are packed in durable double-wall boxes. Similar sized items are packed adjacent to each other. Care is taken to fill all voids with packing paper to prevent shifting and to provide support. The packing paper is 100% recycled material and ink-free. The current box sizes are: Large W33mm, x L54mm x D24; Small W29.5mm x L29mm x D21.5mm.

**b. Ability to limit weight and size of boxes**

GOBI Library Solutions will limit the weight and size of boxes per customer request. Each box has a maximum weight limit of 40 pounds/20 kilograms.

**c. Packing slips**

As customer shipments are packed, we scan each book as it goes into a box and we check each title against a "pick list" detailing books to be shipped to your library. In this way we ensure that the right books go into every box to you each week.

A final quality check occurs when all packed books are re-scanned, producing a packing list for each carton. This packing list enables you to quickly identify exactly what is in each box

### D.3 Fulfillment and Delivery, Packaging-Continued

as you unpack. This final scanning also generates an invoice based on the actual contents of your boxes.

For multiple-package shipments, each box will have its own packing list and the final carton will contain the invoice for the entire shipment. As an alternative, we can provide an invoice in every box.

#### 4. Ability to tailor shipments to individual institution needs

GOBI Library Solutions shipments are sorted by establishing different sub-accounts for specific criteria, permitting tailored shipments that meet the needs of individual institutions. Each sub-account can include instructions to ship and bill to separate addresses. Criteria might include service type (e.g. approval, firm order, standing order, UK, rush), delivery point, and technical services.

#### 5. Ability to check library holdings for duplicate orders.

We prevent duplication across order types. A number of computer and manual audits are routinely performed on each title profiled or submitted for fulfillment. We rigorously follow the client's instructions on the treatment and disposition of any duplicate titles.

GOBI Library Solutions controls duplication of titles published simultaneously by differentiating US and UK or paper, cloth and electronic titles during book-in-hand profiling. Alternate editions of the same title are "linked" in our title file, allowing us to control allocation and shipment among various editions of the same title.

GOBI Library Solutions' procedure for ensuring that firm orders will not be duplicated in approval shipments is to maintain records for all past, current and forthcoming titles handled on approval. Incoming firm orders and standing orders are matched against approval records to prevent duplication. If an order is received for a title that has already been shipped on your approval plan, the order is returned noting the shipment date unless you indicate the duplication is intentional.

In addition, when you set up a standing order with GOBI Library Solutions or notify us of a standing order placed elsewhere, our system will block that title on your approval plan.

For titles ordered online, GOBI provides library staff with a duplication check. GOBI duplication control alerts the user if a title has been previously ordered or shipped from GOBI Library Solutions and asks the user to confirm that an intentional duplicate is desired. The system also identifies and alerts the user if a previous order has been placed for a simultaneous edition of the same title, eliminating paper/cloth/ebook or US/UK duplicates.

Libraries who are members of a consortium can choose whether they wish to allow or disallow firm order, approval, and/or DDA duplication against the shared consortium account. Duplication control settings are granular enough to provide different duplication control settings, depending on whether duplication is occurring against print or electronic books.

## D.5 Fulfillment and Delivery, Ability to check library holdings for duplicate orders-Continued

### Holdings Load Service

Libraries can bolster GOBI's duplication detection by using GOBI Library Solutions' Library Holdings Load Service. By providing a file of ISBNs of your recent ordering history, GOBI Library Solutions will load the ISBNs into your library's GOBI account. When GOBI users land on a bibliographic record for a title your library owns, but was not acquired from GOBI Library Solutions, the notation "Already Owned by Library" will appear on the record. A duplication alert is issued when an order is placed on GOBI for any ISBN in the holdings file. These holdings are also available internally at GOBI Library Solutions for duplication control against approval shipments, as well as orders not placed through GOBI.

Three holdings loads per year are free per institution. There is a \$515.00 charge beginning with the fourth load for an unlimited number of subsequent loads in any one year.

## E. Claims & Cancellations

1. Describe all possible methods and workflows available for claiming of materials (through vendor system, via email, vendor-initiated, etc.). Include proposed timelines for claim notifications and cancellations, both vendor and library initiated.

### Claims

VASCUPP member libraries can send claims for titles to GOBI Library Solutions online by marking the bibliographic record in GOBI and emailing it to your Customer Service Representative. You can also accomplish claiming through GOBI's "contact us" feature, by email, or by regular mail, telephone (800-258-3774), or fax (800-343-7413). Upon receipt of a claim from your Customer Service Representative, our claims department proactively searches the order records for the title, follows-up with the publisher and distributor as needed, and notifies the library of the status of the order.

Claims will be acknowledged within 24 hours by your Customer Service Representative and a resolution will be provided within five working days.

Successful serial fulfillment requires collaboration between the library and the vendor, and this is often carried out at the claiming level at GOBI Library Solutions. The Continuations Department is staffed by ten people who handle the claiming activity necessary for the 70,000 active series titles we sell.

For publishers accepting standing orders, GOBI Library Solutions places orders and claims or confirms those orders on a biweekly basis, each time an adjustment is made to that standing order quantity. Should no adjustments be needed to the standing order, GOBI Library Solutions monitors the due date of the publication and claims on a regular basis following that date.

For titles from approval imprints, books in series are bought via standing orders or direct purchase orders 4 to 6 months prepublication and claimed when overdue.



## E.1 Claims & Cancellations, Describe all methods and workflows...-Continued

### Cancellations

GOBI Library Solutions' cancellation policy is to follow customer directions for canceling orders, or otherwise to cancel only those orders for valid titles that are out-of-print, out-of-stock indefinitely, and/or cannot be substituted. Requested cancellations will be processed within 24 hours.

For automatic cancellations of firm orders, GOBI Library Solutions' default cancellation interval is 540 days (18 months) and the library can request a shorter interval if desired. Because of our open cancellation policy, customers come to us with orders for difficult to obtain titles. Some of these may never become available, resulting in higher cancellation rates at GOBI Library Solutions than some less-accommodating vendors would show.

eBooks can be cancelled if the title has not yet been published. For a mistake at the moment of ordering, the library can immediately contact their Customer Service Representative to see if he or she can "catch" the order before it is immediately fulfilled by the supplier/publisher. If the representative cannot catch the order, they will work on a resolution with our contacts at the supplier.

### Monitoring of Order Status

GOBI Library Solutions has controls in place in GOBI and in our internal systems, to help prevent customers from ordering a title that we already know is not available. A status description in GOBI such as, "publication cancelled," or "order direct," will indicate that a title is not available to be ordered. If the library orders outside of GOBI (for example by email) we will do the research and send a reply letting staff know the title they ordered is not available, and will offer alternatives, if there are any.

If an order is placed and then we find that the title is unavailable (either by claiming or through regular feeds from our suppliers) the order will be updated with a new status which will be visible in GOBI. Statuses include things such as, "Out of Stock," "Out of Print", "Publication Cancelled," etc. In addition to being visible in GOBI, this new status is also visible in order responses as Electronic Status Reports. These reports, which are often utilized as open order status reports, are available in various delimited and EDI formats, and are delivered via email or FTP to appropriate library contacts. Some library systems have the ability to load these automatically via standard EDI protocols; for others, GOBI Library Solutions can supply electronic versions of our customary printed status reports as XML, HTML, or pipe-delimited files. Reports are provided for any monographic orders placed with GOBI Library Solutions, but not for approval automatic shipments or standing orders. Libraries can customize the output frequency, output directory, and US/UK file differentiation.

We are pleased to offer electronic status options. If VASCUPP member libraries select estatusing, we can supply updated status reports daily, weekly, every two weeks or every four weeks via FTP or as an email attachment to up to three email addresses at the library.



## E.1 Claims & Cancellations, Describe all methods and workflows...-Continued

We provide estimated availability dates as obtained from the publishers. In addition, lists of open order titles containing status information (e.g., "open-order," "preparing to ship") are available online through GOBI at any time. For orders placed on GOBI, status information is provided at time of order selection.

## F. Returns

### 1. Detail the contractor's return policy.

GOBI Library Solutions routinely accepts the return of any book within 120 days of the invoice date with the following exceptions:

- Books listed as non-returnable on your invoice
- Serial standing orders
- Books provided with processing (e.g., jackets, polyester jacket covers, bindings, stamps, spine labels), whether provided by GOBI Library Solutions, another processor or the library
- Books ordered through our out-of-print service
- eBooks

Books selected from title notification slips have the same return status as automatic books. The member library will be notified in advance of any titles that are classified as non-returnable. Because GOBI Library Solutions and the library monitor the library's approval profile performance carefully, returns are kept to a minimum. We are proud of the fact that our approval return rate is the lowest in our industry, averaging less than 4%.

Damaged items should be reported to your GOBI Library Solutions Customer Service Representative within 30 days of the invoice date and returned according to instructions provided at the time of your report. Defective books are to be returned to GOBI Library Solutions within one year of invoice date, with the reason for return noted on a copy of the invoice. Incorrectly supplied items should also be reported within 30 days of invoice, and before return. Once returned, we will promptly credit your invoice for the returned titles.

We will credit your account or replace the book promptly if due to our error you receive the wrong book or a book processed incorrectly. For credit, we offer the option of lining out the returned item and paying the amended amount of the invoice or completing an Instant Credit Memo, available in hard copy or online via GOBI's help menu. Upon receipt of an Instant Credit Memo, our accounting department will immediately credit your account for the net amount of the return. Upon completion, the Library submits the memo to GOBI Library Solutions, retaining a copy for its records. The only information that will appear on our system for a credit is the credit memo number, ISBN, title, and credit amount.

Our complete returns policy is available on our web site at <https://gobi.ebsco.com/returns>.

**G. Invoicing & Payment-** Describe the services being offered, including but not limited to:

**1. Invoice Delivery Methods**

Paper Invoice

A printed invoice accompanies each shipment and a list of titles on the invoice is available electronically in GOBI. To obtain this list, staff can search shipped orders by order date, or invoice number or invoice date. The Library will need to set the settings to show net prices if it wants to see the total net price for the invoice or the individual shipped items. Invoices can also be emailed as PDF documents.

Invoices for ebooks will be emailed to the library at approximately the same time the title is entered into the Library's repository. As with ordering, billing to multiple payment centers can be easily accomplished.

If this does not satisfy the Library's requirements, we will work with staff on an alternative procedure for the simultaneous electronic delivery of invoices.

GOBI Library Solutions' default setting for all non-shelf-ready orders is to include a packing list in each box and one invoice in the final box. For orders with physical processing, the default setting is such that the customer will not receive a packing list in any box and only one invoice in the final box. (The invoice will be used as the packing list because it includes the physical processing requirements.)

A customer can elect the custom option of receiving a copy of the invoice in each box. When this is the case, non-shelf-ready orders will then receive one packing list and one invoice in each carton, and physically processed orders will also have a packing list and an invoice per box.

Although our system default setting for physically processed material is not to receive a packing list per box, the customer's account is set up to receive "invoice per box" which then provides a packing list and an invoice per box.

Electronic Invoice

GOBI Library Solutions' supplied files, including electronic invoices, are made available for customer retrieval in dedicated directories in individual customer accounts on GOBI Library Solutions' FTP server.

GOBI Library Solutions provides invoices in standard EDI formats as EDIFACT and X12 that can be loaded into compatible management systems such as Alma. If further integration is required, including additional invoice formats or the output of catalogue data for use in a local system, additional discussions with each individual member library requesting the service will be arranged.

## G.1 Invoicing & Payment, Invoice delivery methods-Continued

GOBI Library Solutions invoices and statements are available on GOBI as PDF documents. We can also email copies of electronic invoices to up to four different email addresses per subaccount. The invoice number appears as a link in Library History and in the bibliographic record on Library Activity search results.

There is no charge for electronic invoicing.

### Technical Services Invoice

GOBI Library Solutions offers several options for vendor (technical) services [but none of those options show the price per item]. Invoice choices for GOBI Library Solutions' technical services are:

- The tech service charge(s) are *included in* the net price of each line item.
- Separate line(s) at the bottom of the book invoice, showing *totals* for various technical services.
- Separate technical services invoice showing *totals* on a technical services-only sub-account.
- Separate invoice on the book sub-account, also showing *totals*.

## 2. Payment Methods

GOBI Library Solutions accepts the following methods of payment for the services offered under this pricing structure: payment by check, electronic funds transfer (EFT) or by debit from a deposit account. Any other method of payment will be subject to approval by both parties.

Our standard payment terms are net 30 days from the date of the invoice to qualified buyers. Invoices not paid within 60 days of invoice date will incur a finance charge of 1% per month. GOBI Library Solutions sends statements on open items at the end of each calendar month.

## 3. Ability to tailor invoices to individual institution needs

Individual institutions can tailor their invoices in a number of ways. GOBI Library Solutions invoices can be sorted alphabetically by title or author, or by ISBN, fund number or library purchase order number. Additional customization includes the ability to subtotal by fund code, limiting the maximum number of titles, and separating invoices by purchase order number where the library uses batch purchase orders.

**H. Additional Services-** Describe the services being offered, including but not limited to:

**1. Cataloging**

**MARC Record Options**

GOBI Library Solutions' offers a variety of MARC record options, including both point-of-order and point-of-purchase records. These services are outlined below:

Point-of-Order Records

At the point of order, GOBI Library Solutions can provide Electronic Order Confirmation Records (EOCRs) in MARC format. EOCRs are files of records for titles ordered on GOBI that can contain embedded local order data. These records can be loaded to the library's local system, thereby eliminating the need to key data. With the standard EOCR service, the records are derived from the GOBI Database and delivered to the customer via FTP; optionally, the library may opt to receive the best available OCLC records via EOCR Plus.

Point-of-Purchase Records

Our point-of-purchase records can be used to update existing order records or, in the case of approvals, can be loaded as new records. Depending upon the level of service selected, GOBI Library Solutions offers flexible options for cataloging to meet the library's needs and budget.

Our most basic catalog record can be provided via GobiShip. GobiShip records are brief records that can include local data mapping for customers requiring a customizable, but minimal, level of service.

Our in-house cataloging services, "**GOBI Metadata Services**" provide LC records upgraded by GOBI depending upon the specific needs of the library, and are available in four levels:

Our **basic level** of service provides *LC Full, Core, EL7 Iccopycat and CIP-level* records. The library may choose one of three upgraded options below. *LC CIP records can be upgraded to full level with any of these options:*

**Provisional:** If an LC record is not available, GOBI Library Solutions provides a brief in-house cataloging record.

**Provisional Plus:** If an LC record is not available, GOBI Library Solutions provides an in-house cataloging record. These records include a call number and at least one subject heading, allowing for 100% shelf ready processing.

**100% Full Records:** If no LC record is available, full records are created by GOBI's in-house cataloging team and are upgraded with full subject analysis and notes and are provided for all titles.

LC records distributed prior to LC's adoption of RDA may contain RDA fields such as 336, 337, 338 and exhibit other indications that they are "hybrid" AACR2r/RDA records. LC records and GOBI in-house cataloging records created after the adoption of RDA will adhere

## H.1 Additional Services, Cataloging-Continued

to RDA to the extent possible based on the encoding level of the record. In most cases, GOBI follows LC practice as to RDA Core Elements and decisions regarding whether to use a LC-distributed continuing resource record.

Alternatively, the library may choose to select one of our **OCLC Plus** services (quote available upon request) which provide records from OCLC, which are then upgraded for the library as needed; levels of service include:

**OCLC Plus Basic:** At point of purchase, the best OCLC record available to GOBI (at the time the ordered item is processed) is delivered to the library. At that time, the library's holdings are set in OCLC.

**OCLC Plus Bronze:** At point of purchase, the best OCLC record available to GOBI (at the time the ordered item is processed) is delivered to the library. If only a brief OCLC or non-LC CIP is available, a GOBI Provisional record is built from the brief record and is, therefore, supplied. Available LC CIPs are upgraded to full level.

**OCLC Plus Silver:** At point of purchase, the best OCLC record available to GOBI (at the time the ordered item is processed) is delivered to the library. If only a brief OCLC or non-LC CIP is available, a GOBI Provisional Plus record is created from the brief record and is supplied to the library. Provisional Plus records contain authorized headings, including series, full call number and at least one subject heading. Available LC CIP's are upgraded to full level.

**OCLC Plus Gold:** 100% full records for all titles, including the best available OCLC record or an LC record upgraded to a full record by GOBI's in-house cataloging team. At this level we can support additional manual customization, such as accession numbering, alternate subject schema and classification.

**eBook Cataloging Plus:** GOBI sends eBook records at the Silver level and provides customized URLs for the supplier and purchase option received by the library.

**Medical Cataloging Plus:** GOBI sends records at the Silver level and provides a full NLM classification number with cutter, and at least one MeSH heading. Records may or may not reflect NLM-based cataloging.

These services, offered at the Basic, Bronze, Silver, and Gold levels, are priced with a subscription and all but the Basic service carry an additional per-title fee. Additionally, for all of the OCLC Plus cataloging services, customers may opt to have GOBI alert OCLC to set holdings for the library at no additional cost.

All OCLC Plus records for print materials are customizable to meet the library's local requirements. Customization may add local data to records, or manipulate existing bibliographic data, and data can be different at the point of order and at the point of invoicing. Machine customization is available for all record types; manual intervention is available for records delivered at the point of invoicing at the Silver and Gold levels and for Medical Cataloging.

## H.1 Additional Services, Cataloging-Continued

Data may be added to bibliographic records in three ways:

- 1) Data submitted with orders and passed through to the MARC records
- 2) Constant data applied to every record
- 3) Variable data added based on elements present in the record or in the GOBI order.

*All OCLC Plus options include our EOCR Plus service for no additional fee; these services provide the best available OCLC record, or a short record with the OCLC control number, at point of order. Customers must have an active cataloging service subscription with OCLC to be eligible for OCLC-Plus services.*

Additionally, GOBI Library Solutions offers a pass-through service to OCLC WorldShare Collection Manager. Through this service, all records are supplied by OCLC and allow for the generation of spine labels.

### **Metadata Services for eBooks**

Provides support for:

- ebooks ordered & invoiced as individual titles on a designated ebook sub-account
- ebooks ordered & invoiced as an ebook collection

GOBI Library Solutions ebook records conform to PCC standards, contain site-specific URLs, and can be customized to meet various bibliographic and local data requirements.

### **Metadata Services for Medical Content**

Through this service, GOBI Library Solutions delivers appropriate medical records for print or ebooks to customers. Choices provided are similar to the Metadata choices outlined above. Enhanced LC/NLM and Provisional+ records contain full LC and NLM classification as well as appropriate LC and MeSH subject headings.

## 2. Shelf-ready

GOBI Library Solutions is a full-service monographs vendor and we provide a variety of processing services. All GOBI Library Solutions processing services are based on a detailed specification developed for each library. Specifications cover service and placement requirements, and exception treatments. A processing service profile typically includes services from one or more of the following service groups: (1) Binding, Strengthening & Jacketing, (2) Physical Processing, and (3) Cataloging Products. The components of each are described briefly below.

Pricing depends on the services selected. Technical Services pricing is reviewed annually. Any changes in record or processing fees are announced in the spring and implemented in July. Binding charges are subject to review with limited notice and reflect changes in vendor pricing to GOBI Library Solutions. Please contact your Collection Development Manager, Alyse Camus, for a quote if VASCUPP is interested in any of the processing services outlined below.

## H.2 Additional Services, Shelf-ready-Continued

### **Binding, Jacketing and Strengthening**

In order to offer libraries a selection of quality binding and strengthening services with varying turnaround and pricing options, GOBI Library Solutions offers products from HF Group's AcmeBinding in Charlestown, MA. AcmeBinding offers Norlam®, CopyCover® and GraphicCover® treatment options, and is a member of the Library Binding Institute. Further information on the company and its products can be accessed on their website: [www.acmebook.com](http://www.acmebook.com).

The commercial binding options are described in detail below. Binding service delays shipment of books with the period of delay varying with the type of treatment chosen. Strengthening and jacketing services are applied without affecting shipping schedules. Binding services are available alone, or in combination with physical processing and cataloging services.

#### *Norlam®*

Pages are double-fan adhesive bound, and spine is reinforced. The paperback cover is mounted on binder's board and laminated with a polyvinyl film. About 20% of paperbacks are not eligible for Norlam binding due to a folded cover or important material on the inside covers. If so, the default action is to bind them with Acmebind, at no additional cost. Alternatively, the books can be shipped unbound. This binding adds about three weeks to receipt of material.

#### *CopyCover®*

Pages are double-fan adhesive bound and spine is reinforced. The paperback cover is color copied, and the copy is mounted on binder's board and laminated with a matte finish. This binding adds about three weeks to receipt of material.

#### *GraphicCover®*

Pages are double fan adhesive bound and the spine is reinforced. The paperback cover is color copied and the copy is mounted on binder's board and laminated with a gloss polyvinyl film. This binding adds three weeks to receipt of material.

### **Book Jacketing**

#### *Polyester Dust Jacket Cover*

For books with separate dust jackets, jacketing provides protection against wear. The loose jacket is encased in a sleeve of clear, glossy, 2.0 mil polyester film and white backing paper attached with polyvinyl acetate (PVA) adhesive to create an archival quality product. The ends of the cover are folded in place and the jacket is secured with acid-free adhesive tape. This treatment secures the book jacket to the volume, protects and highlights text and artwork, and adds body to the jacket. Jacketing is performed as part of routine physical processing and adds no more than one week to the time of delivery.



## H.2 Additional Services, Shelf-ready-Continued

Dust jackets can be shipped to the library in the book, with the book, or can be recycled. Labels can be applied to both (or either) the book and the dust jacket with jackets included in book shipments.

### **Paperback Strengthening**

In addition to conventional binding for paperback, GOBI Library Solutions offers a paperback protection option. It is lower priced and can be delivered more rapidly than binding treatments.

All treatment options are applied at the sub-account level; if a covering treatment is selected for a sub-account, all paperbacks on that sub-account are given that treatment. Most libraries choose to apply only one paperback binding or covering service. Only one treatment can be applied to a sub-account. If a library wishes to select different treatments for different materials, multiple sub-accounts need to be established—one for each treatment type being used. The library controls implementation by assigning materials to the appropriate sub-account. Orders for paperbacks that are not to be covered or bound must be placed against a sub-account for which no covering or binding treatment has been defined.

#### *EasyCover® (US)/ Croc-Cover (UK)*

Two-piece polyester cover for paperback. Rigid, self-adhering 15 mil front and back with 2 mil spine covering.

#### *Hinge Reinforcement*

A hinge-strengthening option using acid-free Easy Bind® clear polyester repair tape. Hinge reinforcement can be applied to any strengthening option.

### **Physical Processing**

Physical processing services can be supplied regardless of library decisions regarding cataloging and binding/jacketing or strengthening.

#### Book Plating

The application of book plates with pressure-sensitive adhesive backing is available.

#### Security Protection

GOBI Library Solutions offers the supply and insertion of standard theft detection devices from *bibliotheca*® and the supply and insertion of 8.2 and 9.5 MHz RF tags. We also handle the application of library-supplied RFID tags.

#### Ownership Marking

We apply library ownership stamps following client specifications as to the number and placement of impressions, and ink color.

Variable location-specific marking is not usually accommodated within a single sub-account; it can be provided if all materials on a sub-account receive the same location stamp.

## H.2 Additional Services, Shelf-ready-Continued

Alternatively, both GOBI Library Solutions metadata support system and OCLC WorldShare Collection Manager can generate various spine label location data for different items within a sub-account.

### Barcode Application

GOBI Library Solutions offers application of library-supplied barcodes as per library specifications. Different placement can be defined for certain materials--piggy-back barcodes for paperbound items, for example. Standard service does not include the supply and application of barcode label protectors. Once applied, barcodes can be scanned for inclusion in the library's cataloging record.

### Circulation Control

GOBI Library Solutions offers a variety of generic date due slips and book pockets and can also apply library-supplied custom circulation-control pieces. Date due slips are available with four, three or two columns.

Our generic book pocket options include: a high-backed pocket with a grid, a low-backed pocket, and pockets with no grids.

GOBI Library Solutions uses generic date due slips for application over RFIDs.

### Cataloging Products

#### Spine Labeling

GOBI Library Solutions' OCLC Plus, our Metadata Services and OCLC WorldShare Collection Manager all support the generation of spine labels with call numbers formatted in accordance with individual library specifications. Labels are printed in Century Gothic font 12-point bold font. GOBI Library Solutions offers thermal transfer spine labels. Location qualifiers are supported for both approaches; for libraries using our Metadata Services, height-based call number qualifiers are accommodated. Thermal transfer labels are self-protecting. Label samples can be supplied upon request.

#### Book Labels

Book labels containing author, title, and classification data are available as thermal transfer or on adhesive-backed stock. A single fee covers both generation and application of book labels.

## 3. Other

GOBI Library Solutions provides a total and value-added service solution. We take a consultative approach to serving our customers helping to solve library problems and are actively involved in the academic library industry. As a result of this approach, much of our development is based on customer feedback. Hundreds of our customers have benefitted not only from our highly competitive discounts which help maximize library budget purchasing power, but also from the inherent savings associated with our technical and workflow support tools.

### H.3 Additional Services, Other-Continued

In addition to high-quality content and ordering features the following benefits are offered at no cost:

- A one-stop shop for a complete collection development and acquisitions service, allowing the Library to achieve numerous workflow efficiencies and to shorten the time it takes to get books to the (virtual) shelf.
- Experienced support team.
- Dedicated Project Management – GOBI Library Solutions will provide an experienced project management team to assist in collection development, implementation, training and support. This can include custom reporting, for example a report for a p-to-e project that identifies print titles available in e and/or purchased e titles now available as DRM-free. GOBI Library Solutions can also supply collection analysis to identify gaps in your collection, retrospective reports to show what titles would have been shipped on approval plans before new plans go live; or assist with title selection for Evidence-Based Acquisition programs.
- Complimentary Training and Marketing – Through EBSCO, GOBI Library Solutions can offer custom promotional materials and training at no added cost, including on-site support.
- Faculty author plans – Assist VASCUPP to acquire monographs authored by its researchers.
- GOBI Spotlight Lists – Lists of librarian curated recommended books that can be acquired in their entirety, or in part, including lists of core titles and best- sellers, as well as lists by language and by subject, or can be subscribed to with regular updates via email. The ability to exclude titles already held or on order is an added feature.

#### Reviews

GOBI Library Solutions is very pleased to be able to offer book reviews from Choice, Publishers Weekly, Booklist and Library Journal within GOBI title records. We also offer two additional review sources, Doody's Reviews Service™ and ProtoView Reviews, for health science titles and new books in the sciences, social sciences, and humanities, respectively. The links are visible when your library subscribes to Reviews. In addition, the bibliographic record will make note of many other review sources including the New York Times Book Review, New York Review of Books, Globe and Mail Reviews (Fiction and Non-Fiction), and Times Literary Supplement; this "Reviews" field is searchable using the "Advanced Search" tool and includes the review publication date, allowing libraries to easily locate the full-text within their own collections.

#### Spotlight Lists

Spotlight Lists are lists of librarian-curated recommended books that can be acquired in their entirety, or in part, including lists of core titles and bestsellers, as well as lists by

### H.3 Additional Services, Other-Continued

language and by subject; these can be subscribed to with regular updates via email. The ability to exclude titles already held or on order is an added feature.

#### Core 1000

Each quarter GOBI Library Solutions generates a list of 250 titles that our bibliographers expect to be essential to academic libraries. The list of 200 non-fiction titles (including non-periodical serials) and 50 fiction titles appears on the 15th of each October, December, April and July with the annual US Core 1000 (and UK Core 300) lists presented each July 31. The lists may be found on GOBI at [www.gobi3.com](http://www.gobi3.com) by clicking on Spotlight Lists. The program takes advantage of our expertise in book description and provides GOBI Library Solutions with a strategic opportunity to assess market data from key libraries in the United States and throughout the world. The selection committee, consisting of senior buyers and bibliographers, makes selections based on criteria designed to identify titles that will stand the test of time as major works.

#### Choice Outstanding Academic Titles

GOBI Library Solutions is pleased to be offering our GOBI Choice Outstanding Academic Titles Program. Each January, Choice, the leader in academic reviews for over 50 years, identifies all titles that were reviewed the previous calendar year as "Essential," "Highly Recommended," or "Recommended."

Through this service, libraries can choose to receive automatic print book shipments of these roughly 575 prestigiously reviewed titles as automatic print books shipments, either by subject, or by complete coverage. If the library has an established approval plan, the service can run on the same account number. If the library does not have an approval plan, or wants it separated from approval, we can set up a new sub-account. Additionally, GOBI Library Solutions will add the Choice Outstanding Academic Titles to our GOBI Spotlight Lists, allowing customers to alternatively subscribe to the reviewed list as notifications only.

Once enrolled in this coverage, customers will automatically be set up to receive the titles reviewed the following year. Customers wishing to stop receiving titles from the program will need to notify their GOBI Library Solutions' Representative. Any changes to the desired title shipments will be implemented, assuming the changes have been identified and communicated before January.

Through this program, customers have access to all of the same customizable, and highly flexible, options that approval profiles allow such as: setting a price limit per title, the option to have notifications sent for non-returnable items, and the ability to purchase more than one copy of a title.

### H.3 Additional Services, Other-Continued

#### Faculty Author Plans

GOBI Library Solutions offers faculty author and major author coverage, assisting librarians in receiving all monographs written by library staff and other authors as designated by the staff soon after publication.

#### Faculty Select

Our new service, Faculty Select, is a customized site for faculty to find Open Educational Resources textbooks (freely available teaching and learning materials via an open license), DRM-free EBSCO eBooks, and titles from CUP, Taylor & Francis and Wiley. Faculty Select provides OER and DRM-free eBooks in a single easy to use interface. Customers using GOBI for their eBook acquisition can leverage Faculty Select and will be set up according to their specific workflow. Additionally, Faculty Select helps mediate acquisitions in order to effectively manage library costs and ensures alignment with the Library's collection development policy.

## I. Customer Service

1. Describe the availability and experience of staff designated to respond to customer service inquiries. Include average timelines and mechanisms for responding to inquiries.

GOBI Library Solutions, an EBSCO company, follows EBSCO's example of agreeing to service standards with our customers. GOBI Library Solutions is committed to ensuring that all libraries receive the best service possible, and that standards agreed upon are continuously met over the life of the agreement. Our Customer Service department has well established procedures ensuring that all Key Performance Indicators (KPIs) are met, and that correct escalation procedures are followed should any problems arise.

**Orders:** We collect performance data weekly for internal review. This includes fulfillment rates both from suppliers/publishers and to our customers. We utilize this information to analyze data and capture any anomaly. In the case of anomalies being found, internal processes are audited and issues are traced back to find the root of the problem. The operations team is responsible for amending the issues, reestablishing balance and finding solutions to further streamline processes without affecting quality and delivery.

**Queries:** Our GOBI Library Solutions' Customer Service Representatives use a Customer Relationship Management system to record all cases. This monitoring system allows us to set a level of priority to incoming emails/cases. This allows management to create reports and to analyze the data, take action on any issues, and to review resolution performance. Every week, the Customer Service Manager circulates a report internally which details:

- number of cases received and
- how they compared to the average weekly volume

### I.1 Customer Service, Describe the availability...-Continued

- percentage of closed cases, in progress or not yet started
- average time to resolution
- response rates and case volume demographic broken down by type of case.

**Cancellations:** Cancellations will be monitored and reported on in our CRM system.

**Invoicing:** Invoices and related credits will be monitored and reported on.

**Online Platform:** GOBI Library Solutions confirms that it is possible to report on downtimes (if any) of its online database, GOBI.

GOBI Library Solutions will happily evaluate any feedback received from member libraries regarding any possible improvements to our performance or the services provided.

Please refer to [Exhibit #10](#), *GOBI Library Solutions KPIs*.

### 2. Describe mechanism for escalating issues.

GOBI Library Solutions takes special pride in having what our customers report is the finest customer service structure in the academic library market. Our worldwide service standard is to respond to a customer query of any kind within the same day. In practice, we respond much more quickly, either at the time of the inquiry when called or within minutes or hours of receiving an email. Our customer service representatives have a reputation for taking whatever steps are necessary to ensure customer satisfaction.

Complicated matters or questions that lead outside of GOBI Library Solutions, often to publishers, may require more time for us to resolve, but customers will always understand the reason for any delayed answer and will feel assured that GOBI Library Solutions is working to deliver an answer as soon as possible. We routinely log queries and response times. We will record any complaints, our remedial actions, and our sense of a customer's reaction to the solution. This tracking allows us to monitor and improve our quality standard.

Krystal Katsouleris, Manager Customer Service, provides oversight of our service quality and will assist in program resolution if necessary. Krystal will call upon other members of GOBI Library Solutions' management team to ensure any problems are fully resolved. Your Collection Development Manager will do the same.

### J. Vendor Catalog and Order System- Describe the services being offered, including but not limited to:

GOBI provides individual accounts (log-ins) for selectors and acquisition staff, with several different levels of GOBI access for monograph or continuations ordering. There is no limit to the number of individual accounts.

Through the “preferences” menu users are able to personalize the way GOBI displays certain aspects of bibliographic records [REDACTED]

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

[REDACTED]

[REDACTED] This process saves time as staff doesn't have to key data or send emails among to notify of the selection being made. The title is now ready to be ordered by the acquisitions librarian.

a. Searching

GOBI offers many easy to use ways to search and order titles:

(1) **Quick Search** is at the top of all GOBI screens. The Quick Search can be used for title, author, and ISBN.

(2) GOBI's **Standard Search** allows you to search for titles using bibliographic criteria such as title, author, publisher, date, classification, or subject headings. The Standard Search screen allows you to find titles that match several different search criteria at the same time, or to search for synonyms. You can construct simple and complex searches using the Standard Search screen. The bibliographic record in GOBI shows the real-time availability of the title as displayed in the screenshot below:



## J.1 Vendor Catalog and Order System, System Functionality-Continued



Title: MAROONED: JAMESTOWN, SHIPWRECK, AND A NEW HISTORY OF AMERICA'S ORIGIN.  
Author: KELLY, JOSEPH, 1962-  
Publisher: BLOOMSBURY  
Pub Year: 2019  
Binding: Cloth  
Content Level: GEN-AC  
LC Class: F234.J3K449 2018  
Subject Headings: FRONTIER AND PIONEER LIFE--VIRGINIA--JAMESTOWN.  
YBP Interdisciplinary Topics: Historical  
Approval Note: AUTH: COLLEGE OF CHARLESTON.  
Geographic Focus: Virginia  
Faculty Affiliation: College of Charleston  
Language: English  
US List: 32.00 USD ▼  
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[table of contents](#)  
[title summary](#)  
[Library Journal](#)  
[Publisher Weekly](#)  
[Booklist](#)

(3) The **Advanced Search**, a GobiPlus subscription feature, allows for highly sophisticated searching according to GOBI Library Solutions approval plan descriptors and terminology. ■

Using the Standard or Advanced search features within GOBI, a customer can choose at the time of a search result whether or not they want to save the search parameters. The customer can then load the search the next time they want to search the same parameters by clicking on “retrieve parameters” within the search screen.

### Saved Search Parameters

Using the Standard or Advanced search features within GOBI, a customer can choose at the time of a search result whether or not they want to save the search parameters. The customer can then load the search the next time they want to search the same parameters by clicking on “retrieve parameters” within the search screen.

The parameters are saved within GOBI. They are managed under the Search Menu under the 'Manage Saved Searches' heading.

To save a search, the customer will run a search and confirm that the search returns the type of titles they expect. In the result the customer will click the 'Save Parameters' button. The customer will then name the Search and click OK.

### Add Unlisted

Additionally, the Add Unlisted tool in GOBI allows libraries to order titles not found in our database whether they are in-print or out-of-print. To assist us in searching we ask that you provide as much bibliographic information as possible on the ordering screen, with the title required and a minimum three pieces of bibliographic information among:

- Author/editor
- ISBN/ISSN

### J.1 Vendor Catalog and Order System, System Functionality-Continued

- Publisher/imprint
- Edition or volume number
- Binding or price
- Place of publication
- Publication year

The title will be integrated into the library's established cataloging and processing workflows once it arrives at GOBI Library Solutions.

#### b. Requests

##### i. Selectors/liaison librarians

GOBI has been specifically developed as a tool for academic libraries to collaborate on the purchase of titles, no matter how different their campuses and selectors are. Libraries can utilize GOBI's folders for a diverse group of selectors in one institution to share their reviews of potential purchases. In the case of interdisciplinary titles for which many different selectors may have oversight, the library could create folders named, for example, Women's Studies, Native American Studies, or Nanotechnology. These folders could be set up as shared folders where other selectors can post titles for another's consideration.

In addition, all GOBI users can post notes and comments on a title record. These notes become part of the permanent title record for all other users to see when they land on that title record. Used in combination with the GOBI folders feature, selectors can categorize titles in various folders and have their own comments appear on each title in those folders.

Libraries can easily involve faculty in this collaborative process. Understanding that libraries need to put up as few barriers as possible in order to have ample and consistent faculty participation,

[REDACTED]

### a) Order Placement

Group	Should take action	Should not take action
All respondents	95%	5%
Male	94%	6%
Female	96%	4%
18-29	97%	3%
30-49	96%	4%
50-69	95%	5%
70+	94%	6%

If appropriate, faculty (or others) can participate in the selection process easily and significantly. GOBI Library Solutions streamlines the process for faculty and makes it simple for them to participate. Faculty do not require a login and password under this system and do not have to learn to use the entire database. Faculty can review the list of suggested titles for their disciplines, mark those in which they are interested, and submit the recommendations to the library.

[illegible]

## 37

## J.1 Vendor Catalog and Order System, System Functionality-Continued

administrator sets up other users in the library very easily, giving them specific levels of access. No one else would be able to access the library's data.

### Authenticating Users for eBook Access.

EBSCO offers a variety of methods for authenticating users, as outlined below:

- IP Address
- Patterned IDs
- Patron ID Files
- Referring URL
- User ID and Password
- Cookie Authentication
- OpenAthens Authentication
- Shibboleth Authentication
- HTTPS Authentication
- Personal User Authentication

Sites may select the best method to meet their user-authentication needs, and sites can use EBSCOadmin to set up their preferred method of authentication. Any one of these methods can also be employed simultaneously to ensure a well-rounded approach to patron authentication.

In addition, EBSCO can support single sign-on through any SAML-compliant identity solution, including OpenAthens, Shibboleth, Ping, Okta and Microsoft ADFS. EBSCO regularly uses SAML 2.0 and should have no problem working with the FEIDE e-ID. EBSCO will work with the library to ensure its preferred methods of on-site and remote authentication are followed.

Additional eSuppliers offer a range of authentication methods including IP, EZ Proxy, Athens, Athens Org, Shibboleth, and referring URL.

## 2. Ability to interface with third-party library systems

GOBI Library Solutions has developed close working ties with many library systems vendors. Our ILS partners include: Evergreen, ExLibris (Alma, Aleph, Voyager), FOLIO, Innovative (Sierra, Millennium Classic, Virtua, Polaris), Koha, Kuali (OLE), OCLC (WMS, SISIS), SirsiDynix (Symphony/Unicorn, Horizon), TIND, and TLC (Carl Library Solution). Through these relationships GOBI Library Solutions has designed interfaces to maximize the flow of library- and transaction-specific data as well as bibliographic data. Integration Options include:

- API Integration – real-time data transfer
- Electronic Data Interchange (EDI) – for orders, invoices and status reports
- MARC Records – Receive in GOBI and upload to the library's local system

## J.2 Vendor Catalog and Order System, Ability to interface with third-party...-Continued

We strive to create and maintain robust interfaces for invoice data. Electronic order confirmation records (EOCRs), shipping, cataloging records and other local data can be customized to meet local library and system requirements.

When major changes or developments are introduced by automated system vendors, we work with a user site to review the new capabilities, evaluate workflow implications and, if necessary, amend or develop appropriate ordering and support interfaces. As a result, there is usually no charge for work that may be needed to make our ordering interface work with the client's system.

We also support basic services with many other integrated library systems that have a smaller number of installations within our customer base.

As always, we rely on input from our library customers to determine priorities for continuing development. We are currently talking with the developers of the emerging open source systems, to ensure that libraries' acquisitions and cataloging workflows with GOBI Library Solutions will be as efficient as possible.

### 3. Customization

Through the "preferences" menu users are able to personalize the way GOBI displays certain aspects of bibliographic records such as classification, pricing, and the level of detail in a record. Users are also able to save order and selection acknowledgements, set general cart preferences, and selecting and ordering preferences. Additionally, users can create and manage their own folders, order detail templates and peer groups.

#### a. For administrators

As noted above, the GOBI administrator's role is to create account logins and also assign ordering, selecting or exporting authorities for GOBI users. Administrators can also limit access to certain financial reporting available via GOBI. Otherwise the administrator has the same options for customization as other GOBI users.

#### b. For selectors

GOBI Library Solutions will work with selectors to build customized templates that contain only the relevant information for that selector. Templates allow users to pre-set selection and order details. With our assistance, the selector can create templates on the Manage Templates screen in the Options menu. When creating a template, the selector can choose which location and/or fund code they want to use. If responsible for multiple funds or locations, they can create multiple templates. Then when ready to select or order, they can choose to apply the template to populate the fields with the appropriate information.

### J.3 Vendor Catalog and Order System, Customization-Continued

#### GobiSmart

In the library's GobiSmart profile, which applies to all GOBI Library Solutions sub-accounts, we have a field for local order ID(s) and the ability to add Fund Code Validation lists and Location Validation lists. GobiSmart controls the fields and field labels that are displayed as local order details on all GOBI orders, selection and export screens, and on all templates. With a GobiSmart profile, a library can require different fields for ordering, selecting and exporting. GobiSmart profiles are maintained by GOBI Library Solutions.

Fund codes can be specified within a library Approval Plan Profile. These codes can be carried through the entire notification, selection, ordering, cataloging, and invoicing process

All fields in GobiSmart can be set up with a validation list (drop down menu). If a field is not set up with a validation list, it will be a free text field. The Library can determine the fields and field labels. The GobiSmart Fields are:

- >PO Number
- >Fund Code
- >Initials
- >Note to GOBI
- >Other Local ID
- >Location
- >Local Data 1
- >Local Data 2
- >Local Data 3
- >Local Data 4
- >Subaccount
- >Purchase Option (for eBooks)

Please contact your Customer Service Representative to make changes to the defaults.

#### 4. Collection development tools

GOBI Library Solutions has long supported our library customers through customized, holistic and integrated workflow solutions that meet the unique needs of each library we serve. We recognize that libraries have many choices when it comes to monographs acquisition, but GOBI Library Solutions has earned a reputation for moving beyond content acquisition alone and offering an ever-increasing suite of support tools that favorably impact the work in all areas of acquisitions, collection development and technical services.

As previously mentioned, GOBI Library Solutions' online catalogue is called GOBI, and it is a complete online support system available for library acquisitions and collection management. Developed in consultation with customers, and launched in 1996, GOBI was the first web-based acquisitions and collection development service. Our GOBI platform is an industry leader, and we are currently working on enhancements to both our user-

#### J.4 Vendor Catalog and Order System, Collection Development Tools-Continued

friendly platform and to our services.

Our efforts to integrate GOBI and our offered services into library workflows have led us to establish strong working relationships with library system vendors, bibliographic utilities, and library consortia world-wide; all of which help to ensure the accuracy and validity of our data.

By its very nature, GOBI—and the searching, sorting, selecting and reporting opportunities it offers—is a robust collection development tool. For those unfamiliar with the database, we offer one-on-one or small group training at the library, and we also offer tutorials on GOBI as well as collection development webinars.

#### 5. Reporting

GOBI offers customers a means of obtaining information directly through GOBI's powerful and flexible report writing tools. GOBI Library Solutions' customers have continuous access to customizable real-time management reports which can help track the status of an order. These extensive reports can be emailed within minutes of being requested in a choice of formats including: PDF, tab-delimited or in *Excel*. These report output formats allow staff to easily manipulate the data, to analyze collection development and expenditure patterns and to support plans and predictions for the future.

Through these reports, library staff can see the status of open orders, expenditures by account, sub-account, or fund code, transaction history, any instructions to GOBI Library Solutions, and a great deal more.

Reports that can be run include the following:

**Approval Activity Reports** categorize and tally approval activity by subject (LC, NLM or Dewey classification), Library Fund Code, Publisher, Descriptive Parameter, Academic Level, or Series Title. Within each category, data are summarized to reflect all titles (print and electronic) profiled by GOBI Library Solutions, titles profiled for the library, approval titles returned, title notification slips sent and returned as orders. Approval activity for the library can be reported, if chosen, for a single call range, for dates specified, and for University Press or Trade Publishers, together or separately. For returns, the library has the option to include reasons in the Activity report or can run the separate Returned Approval Titles with additional sort/search options.

**New Title Reports** in GOBI provide the library with an opportunity to learn of titles profiled at GOBI Library Solutions and their associated costs in a given time period, and to make comparisons with other periods. Please look in our database, GOBI, for sample New Title Reports (on the left under "Contents"). For *customizable* reports click on the New Title link under "Approval Reports," permitting library staff to organize the information by publisher



## J.5 Vendor Catalog and Order System, Reporting-Continued

instead of subject, for example, and to include or exclude publishers by type, e.g. trade or university press, and to include or exclude imported titles.

**All Publishers in Your Approval Plan** details the publisher base of an approval plan profile and can be modified at any time. A report detailing all publishers not in the Library's approval plan is also available.

**Approval Plan Profile** explains the Library's approval plan arrangement with GOBI Library Solutions. Detailing the subject and non-subject portions of the Library's profile, it operates with the Approval Plan Publisher Profile and should be considered in that context.

**Expenditure Reports** show the number of books shipped to the Library, number of books returned, and net expenditures for a specified date range. Expenditure Reports can be sorted by subject (LC, NLM or Dewey classification), fund code, publisher, or totals can be presented in a one-line summary.

**Open Order Report** is a snapshot in real time of the Library's open orders with a subtotal for not-yet-published titles and another subtotal for orders that have allocated. The report can be organized by sub-account, fund, or purchase order number, and there is also a summary option. If a title list is needed, users can go to the "Open Order" function under Reports on the Main Menu. Sorting results by library history will group the allocated titles so they're easy to view, print, save or email.

**Library's Transaction History Reports.** These are primarily available by searching within the GOBI database of the Library's open orders, shipped or invoiced orders, and canceled orders, encompassing the most recent two to three years of the libraries transactions with GOBI Library Solutions. Titles can be searched and reported by date, purchase order number, fund code, account number, invoice number, publisher, title, and ISBN.

**Standing Order Reports** are available in GOBI using several sort options. Library staff can search "Volumes Shipped" for a list of titles received within a given series. GOBI also provides volume history as a searchable option for continuations titles.

**Peer Reports** are an exciting feature that allows GOBI users to compare their activity to that of other GOBI Library Solutions customers by creating their own customized group of peers. Peer Comparison allows for the creation of a list of titles purchased by a peer, but not by the Library; or titles purchased by neither; or by both. Peer Ranking allows staff to see in graph form the title-level view of a peer's activity and how their library ranks against other libraries, by titles acquired, for given parameters. Please note that library financial data is not accessible, and that peer queries and reports are only run against title activity.

**Consortial Reports** within GOBI allow librarians at separate member institutions of a consortium to see instantly any activity between GOBI Library Solutions and other members for any title or for a wider universe of titles defined. These reports permit access to

## J.5 Vendor Catalog and Order System, Reporting-Continued

information about titles acquired or not acquired by the consortium, either in title-list form or in graphic form. By clicking on the [GobiTween](#) link within a title list, staff can view consortium-wide activity for that title.

The Library's GOBI Library Solutions Collection Development Manager is available to help interpret and analyze the data contained in GOBI management reports.

Please refer to [Exhibit #3](#), *GOBI Management Information Reports*.

## K. Set up and implementation- Describe the proposed implementation plan, including but not limited to:

### 1. Typical implementation timeline and proposed project plan

GOBI Library Solutions is committed to helping libraries develop an efficient workflow, from the point of selection all the way through account set-up to invoice payment. We consider the level of workflow support that we currently provide to libraries to be one of the differentiating factors between GOBI Library Solutions and other book vendors. Through GOBI Library Solutions' online database, GOBI, libraries have access to a complete online support system for acquisitions and collection management which allows the library to achieve numerous workflow efficiencies and to shorten the time it takes to get books to the shelf. GOBI allows for the integration of selection and ordering, as well as timely information on the status of open orders and a wide suite of financial and activity reports, to help a library manage its title flow and budget through the course of a fiscal year.

GOBI Library Solutions will work with the VASCUPP member libraries to design a transition plan that meets the needs of each individual library. Collection Development Manager (CDM), Alyse Camus, will conduct an on-site visit to work with the library staff and will discuss acquisitions details for both print and ebooks, including Standing Orders, arrangement of Technical Services, DDA profiles, physical processing support, and possible library profiling for an Approval or Notification Slip Plan (New Title Alert service). In the process, Alyse will design account parameters and provide GOBI training for searching, ordering and running management reports.

Thereafter, Alyse and your Customer Service Representative will work together in providing service to the Library. Together they will monitor the member library accounts to confirm that we are providing the best possible resources and support.

In our Transition Timeline, attached as [Exhibit #4](#), we have outlined the major tasks to be undertaken, and the key milestones to be reached during the lead-in period before the commencement date of the Contract. GOBI Library Solutions has extensive experience transitioning libraries to our services and systems, and during our partnership with the VASCUPP consortium, we will make every effort possible to help further the collection development needs of each library.

## K.1 Set up and Implementation, Typical implementation timeline...-Continued

For new member libraries, GOBI Library Solutions' representatives will identify all tasks that fall under their responsibility and steps will be taken to formally introduce GOBI Library Solutions to the library, along with an invitation to meet. We would seek to gain a full understanding of the Library's desired workflows so that we can articulate, and show, just how our services can be configured to meet specific needs. As well as capturing details pertaining to the Library's preferred publishers, its preferred account profiling criteria, etc., we will set up the accounts needed to enable purchasing via GOBI. Additional technical service needs will be understood, and steps will be made to configure EDI, API or other technical services as required.

### 2. Institutional level staff roles necessary for implementation

Project coordination and communication with VASCUPP libraries will be primarily the responsibility of your Collection Development Manager, Alyse Camus, and your designated Customer Service Representative. These individuals will work closely with the relevant business departments responsible for delivering collection development services to Concordia University, and will provide all relevant training to the library staff members.

If awarded a contract with VASCUPP, GOBI Library Solutions will assign a team of specialists to work with the consortia members. We will work with each member library to design training that meets their needs. Alyse will conduct an onsite visit to meet with the library staff and discuss acquisition details, the arrangement of technical services, physical processing support, and library profiling options. In the process, she will design account parameters and provide GOBI training. Thereafter, Alyse and the Library's assigned Customer Service Representative will work together in providing service to the library. Together they will closely monitor each account to confirm that we are providing the best possible service.

**Alyse Camus**, *Collection Development Manager*, has previous experience in public services, preservation, and collection development--skills garnered during her time in positions at Duke University, Indiana University, and Pepperdine University. In addition to pursuing her career in libraries, Alyse has also devoted herself to learning new languages, studying intensely in both Russia and Hungary. She has her B.A. in American Studies and Russian/Eastern European Studies from the University of Texas at Austin, and a dual M.A./M.L.S. in Eastern European Studies from Indiana University. Originally from San Diego, California, and with experience across the globe, she now calls the Raleigh/Durham area home and is excited to be working with libraries throughout the region. Alyse can be reached via email at [acamus@ebSCO.com](mailto:acamus@ebSCO.com) or by phone at (919) 370-6986.

In addition, several other key people will be assigned to help facilitate the VASCUPP contract including:

**Moriah Guy**, *New Business Development Manager, Library Technical Services*, can assist you with ILS workflow-related issues. Moriah joined GOBI Library Solutions in 2017 after completing a Master of Management in Library and Information Science from the University

## K.2 Set up and Implementation, Institutional level staff roles...-Continued

of Southern California, Marshall School of Business. Before USC, Moriah completed her Bachelor of Science degree from Southern Utah University. After moving to California with her family, Moriah worked in the pharmaceutical industry in both quality assurance and regulatory affairs. In addition, she has three years of experience as a Senior Museum Assistant at the Garth and Jerri Frehner Museum of Natural History in Southern Utah. Moriah can be reached at [moriahguy@ebSCO.com](mailto:moriahguy@ebSCO.com) or by phone at 760-201-6606.

**Ashley Fast**, *Director of Collection Development and Workflow Solutions*, joined GOBI Library Solutions from EBSCO in 2007 after earning her M.L.I.S. degree from the University of Southern Mississippi. Her emphasis in her M.L.I.S. program was cataloging, and she has done continuing education through the Mississippi Library Commission and Wayne State University. As a Senior Collection Development Manager with GOBI Library Solutions, for more than eight years, Ashley has extensive experience with assisting academic libraries meet their collection development and acquisition goals.

**Charles Hillen**, *Director of Library Technical Services*, will play a primary role in defining and monitoring your technical services from GOBI Library Solutions. Charles joined GOBI Library Solutions in 2014, having been the Head of Acquisitions and Serials at Loyola Marymount University in Los Angeles, CA, for four years. Prior to LMU, he held a similar position at the Getty Research Institute Library, also in Los Angeles, and was previously Lead Cataloger at Old Dominion University in Norfolk, VA. His knowledge and experience with monograph acquisitions, serials, e-resources, collection development and technical services provide the solid well-rounded background necessary to assist you. Charles is also very active in the research library community and is a member of the American Library Association, including ALA's Library Collections and Technical Services Division. He earned his M.S. in Information Science degree from the University of Tennessee-Knoxville.

**John Elliott**, *Vice President, Sales*, joined GOBI Library Solutions from EBSCO in 2004. Prior to his current position, he was an Opening Day Collection Specialist for Baker and Taylor's (B&T) School Library sales division and had served in B&T's school division since January, 2002. Before joining B&T, John was the Regional Sales Manager for Ingenta's Library Services division. Previously, John held senior marketing and sales positions with TheScientificWorld.com (Director of Partner Marketing) and increasingly responsible positions with Academic Press from 1994 to 2001. Some of the key positions he held at Academic Press were Senior Sales and Marketing Manager for Physical and Applied Science Works, Marketing Manager (Online Products and Major Reference Works), Product Manager (Biomedical Sciences), and Copywriter (Physical, Engineering and Computer Sciences). John is a graduate of San Diego State University (BA in Journalism, Public Relations and Education) and has also earned an MBA Certificate from Tulane University.

Our approach is to work as a team to provide quality service to our customers. Although Alyse will be your main contact these other individuals will be working closely with each library to ensure we are meeting all of VASCUPP's needs.

## K. Set up and Implementation- Continued

### 3. Approximate number of staff hours, broken down by staff role, necessary for implementation

Upon award of the contract, GOBI Library Solutions will develop a plan to manage and implement the full range of services required by VASCUPP member libraries. Introducing a library to the breadth and depth of our collection development and workflow services, listening and understanding the library's requirements, fitting them together, and implementing them properly all take time. With a well-planned timeline, careful project administration, and a generous period of time between the tender award and the start date, we expect that the services can be fully explored, implemented, and tested so that VASCUPP is ready to go full speed ahead. GOBI Library Solutions' staff members are experts on how our services and systems work. GOBI Library Solutions staff will work to understand each library's users' community needs and systems. By doing so, we can learn how to customize our approach to fit the library's needs. We expect that VASCUPP libraries will articulate when our services need adjusting, in order to come up with a shared understanding for seamless selection, purchase, and the delivery of monographic materials.

Once decisions are made, clear, comprehensive documentation will ensure that all parties will have accurate records of those decisions. Frequent and open communication is key to ensuring that our understanding and service expectations are aligned. We expect that the contract implementation would start with a meeting with all concerned staff members to discuss any outstanding questions, set expectations, and would agree upon a timetable for implementation. Regular visits can be scheduled as frequently as needed due to Alyse's close proximity, but we would also be available for scheduled and unscheduled phone calls, web conferences, and e-mail correspondence.

Please refer to [Exhibit #4](#), *Transition Timeline* for the approximate number of staff hours necessary for implementation.

### 4. Contractor support during the implementation process

As shown in the Transition Timeline, we will schedule internal meetings and conference calls so that the management of the contract can begin in a controlled and considered manner, under the stewardship of both the CDM and Library Technical Services expert Moriah Guy. These individuals will work closely with all of the relevant business departments responsible for delivering collection development services to member libraries.

At various points throughout the year, all team members detailed above will meet internally to ensure that the contract is managed effectively, any opportunities for improvement are identified, and actions are taken to address them. Internal meetings also provide an ideal forum for colleagues to share best practices so that we can be sure the Library is being managed with a sense of parity on an ongoing basis.

After the initial training, Alyse will continue to visit the library on a regular basis, or as requested by library staff. The staff can also obtain/monitor information regarding the

#### K.4 Set up and Implementation, Contractor Support...-Continued

library's account directly through GOBI's powerful and flexible report writing tools. These extensive, customizable real-time management reports can be emailed to specified library staff members within minutes of being requested in PDF or tab-delimited format. These report output formats allow for easy manipulation of the data, analysis of collection development and expenditure patterns, and support for plans and predictions for the future.

#### 5. Best practice recommendations for implementations

GOBI Library Solutions is committed, in the spirit of partnership, to engaging in continuous dialogue and communication with VASCUPP member libraries not only during the first year of implementation, but for the foreseeable future. While the first year will involve close collaboration, clear communication, and in-depth training regarding GOBI Library Solutions' many acquisition and workflow services, the ultimate goal is to develop a marketing plan that will bring value to member institutions and their patrons throughout the life of the partnership. The GOBI Library Solutions team will schedule individual meetings with each institution to discuss and develop a customized plan based on their specific institutions' goals and acquisition needs as well as best practices drawn from our successful partnerships with academic institutions around the world. Ongoing communication in the form of additional webinars, monthly newsletters and periodic updates throughout the life of the partnership will help ensure that GOBI Library Solutions continues to meet the needs of each institution and members have visibility into the latest service enhancements, new content and supplier partnerships, workflow innovations, and industry trends that could benefit their institutions, faculty, and patrons.

GOBI Library Solutions' primary "product" is service. Our goal throughout our partnership with VASCUPP will be to provide the best service possible and to meet the needs of each unique institution. We will achieve this objective through vision, action, innovation and a commitment to continuous improvement. GOBI Library Solutions continually invests not only in our mission to ensure the long-term growth of products, services and technologies for our customers, but also to the library profession itself. The backing of our parent company, EBSCO, a leading technology provider, gives us access to one of the largest technology teams in the industry. From our back-end infrastructure and user interfaces to implementations and customer support, every aspect of GOBI Library Solutions service is informed by technological expertise. VASCUPP and its members will be a prominent partner in our company's future. We are committed to working and listening to your needs to both address your evolving requirements, as well as to make us a better service provider for all of our customers worldwide.

## **L. Training and Documentation**

1. Describe available documentation for user support and system administration and provide copies for review if requested. Description of documentation should include type of documentation (e.g., HTML, PDF, or Excel documents) and whether freely available to all users or restricted to local library administrators.

While GOBI is an intuitive service that can be easily understood by library personnel with minimal instruction, GOBI Library Solutions has always firmly believed in providing our users with a variety of training tools and continuous support for the GOBI database. In addition to regular onsite training to support the libraries, we also offer telephone and email support, online tutorials, as well as specific, context-sensitive 'help screens' across the entire database designed to ensure a productive user experience. 'Quick Guides' available as PDFs can be found within GOBI under the 'Contents' menu and tutorial recordings are also available via YouTube videos.

Recent webinar topics have included: a New User Overview, Selection Alerts, GobiExpress, Rush Ordering, and Using & Creating Templates.

User support is available freely at any time to any GOBI user and is not restricted to local library administrators.

2. Describe on-site training sessions taught by contractor personnel available to librarians and other staff at each VASCUPP institution (specify any associated charges in Section X. Pricing Schedule).

As a current GOBI user, the VASCUPP members may not require intensive training on the user interface; however, training is available both in person and online. Upon award of the contract, the library's Collection Development Manager will contact designated library staff to assess training needs.

Our typical training is presented in three sessions:

- The first session is a general one in which all the benefits of GOBI are introduced.
- The second session is on acquisitions, in which we cover how to search and order firm orders, how to order from title notification slips, and how to generate management reports.
- The final session is on collection development. We cover searching, viewing and selecting title notification slips. We also look at (books or) slips not sent by subject type and look at the library profile online to determine why a (book or) slip was included or excluded in a shipment.

Our usual practice is to schedule one such visit for the sessions described, but special circumstances might indicate a second visit. The schedule would depend largely on a library's staff availability. Follow-up support is provided either by the dedicated Customer



## L.2 Training and Documentation, Describe on-site training sessions...-Continued

Service representative who is available for over-the-phone assistance whenever needed, or by your Collection Development Manager via email or phone.

For GOBI support by phone, you can contact our GOBI Product Support Specialist, Jessica Fredyma-Cox, at 800-258-3778 x8877.

3. Describe online training sessions taught by contractor personnel available to librarians and other staff at VASCUPP institutions (specify any associated charges in Section X. Pricing Schedule).

GOBI Library Solutions is able to offer online workshops at a customer's convenience. Using web and audio-conferencing software, GOBI can deliver interactive demonstrations to your desktop. Led by our Sales, Customer Service, and Library Support Center staff, sessions can be structured to suit broad instructional needs or tailored to a specific department's circumstances. Additionally, YouTube videos/tutorials are available through the "Contents" menu in GOBI at any time.

## M. Trial and Samples

1. The Contractor shall provide VASCUPP members trial access to applicable systems.

[REDACTED]

While we suggest you use the convenient on-line tutorials for immediate assistance, you may also contact GOBI Product Support Specialist Jessica Fredyma-Cox at 800-258-3774, extension 8794 or by email at [jfredyma@ybp.com](mailto:jfredyma@ybp.com); your Collection Development Manager Alyse Camus by email at [acamus@ybp.com](mailto:acamus@ybp.com) or your Customer Service Representative for any questions.

2. The Contractor shall provide samples of the following:

- a. Packing slip

Please refer to [Exhibit #5](#), *Sample Packing Slip*.

- b. Invoice

Please refer to [Exhibit #6](#) and [Exhibit #7](#) for samples of our Print and eBook Invoices.

- c. MARC record file

M.2 Trial and Samples, The contractor shall provide samples...-Continued

Please refer to [Exhibit #8](#), *Sample MARC Record*.

d. Spine label

Please refer to [Exhibit #9](#), *Sample Spine Labels*. Please note that we have included several samples to demonstrate the different font and size options available. We have also included a sample spine label protector for reference.

## Appendix #1

### Statement of Expertise, Qualifications and Experience

GOBI Library Solutions from EBSCO (formerly YBP Library Services (YBP)) is headquartered in Contoocook, New Hampshire (USA). We have been in business for nearly 50 years specializing in service to academic and research libraries for both print and ebooks as well as cataloging and other technical services. We have offered Approval and new book alert plans since 1974 and Standing Orders for 25 years. In our headquarters we have, in addition to our warehouse and shipping department, all personnel required to manage and carry out the necessary functions associated with our role as a full-service book vendor to academic and research libraries worldwide – with the exception of local staff geographically situated in locations closer to the customers they serve. Here in Contoocook, [REDACTED], you will find: Customer Service, Contract, Bid and Pricing Administration, Buyers, Information Services, Cataloging and Book Processing, Order Entry, Claims, Standing Orders, Human Resources, Profilers and Profile-rule Writers, Sales, and eContent departments.

[REDACTED] We support library consortia collecting in both print and digital formats around the world. We are known for innovation in integrating eContent with traditional print materials, technical development and support, effective approval methodology, excellent customer service and fair pricing. Our staff, always ready to assist you, includes many experienced librarians. Compared with other academic vendors, GOBI Library Solutions offers the broadest publisher coverage, most extensive inventory, and the most flexible approval plan profiles for libraries.

In 1999, as YBP, we merged with Baker & Taylor (B&T), the largest information distributor in the world, to become their academic division. In December 2009, Baker & Taylor acquired Blackwell Book Services North America (BNA) and Blackwell's Australia-based James Bennett bookseller. These changes allowed the expanded US-based YBP Library Services to better meet the rapidly evolving information and workflow needs of academic libraries around the globe. In early 2015 B&T sold its interest in YBP to EBSCO, a world leader in providing electronic databases and subscription services to millions of end users around the world. As of October 2016, we have rebranded YBP to GOBI Library Solutions from EBSCO to better reflect our service offerings and commitment to libraries worldwide.

Our parent and family-owned company, EBSCO Industries, Inc. offers a strong financial underpinning and access to additional resources, including a world-class team of IT professionals. EBSCO, founded in 1944, is a diversified company which continues to grow through a commitment to both customer service and customer-driven development, and, as a result, is constantly expanding its suite of products and services. Headquartered in Birmingham, Alabama, EBSCO now employs [REDACTED] worldwide and has more than 40 operating divisions throughout 23 countries, with the Information Services division, which GOBI Library Solutions is a part of, representing the majority of its business activities.

Effective September 1, 2017, David Walker took over as EBSCO's CEO. David joined EBSCO in 2000 as the General Manager of Military Service Company, EBSCO's original business, and held the role of Chief Operating Officer and Group President prior to assuming responsibilities as CEO. When David became CEO, Tim Collins (former CEO) continued on as President of EBSCO Information Services, a division of EBSCO Industries.

Our relationship with EBSCO affords numerous opportunities for collaboration, while we are also able to continue to rely on Baker & Taylor's, and others', state-of-the-art distribution facilities from which we

pull inventory to provide unparalleled firm order service. With continued growth each year, and a 75-year history, EBSCO consistently ranks in Forbes' annual list of the top 200 largest privately-held corporations in America and maintains a Dun & Bradstreet financial strength rating of 5A1, the highest awarded.

GOBI Library Solutions provides our library customers with a total and value-added service solution. Hundreds of our customers have benefited not only from our highly competitive discounts which help to maximize library budget purchasing power, but also from the inherent savings associated with our technical and workflow support tools. These workflow support tools reduce library operational and overhead costs as GOBI Library Solutions assumes a greater portion of the library technical service workload.

We are pleased to present the following references to James Madison University and the members of VASCUPP:

Client	Length of Service	Address	Contact Person/Phone #
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

# ASHLEY FAST

## EXPERIENCE

### **GOBI Library Solutions from EBSCO**

2017 – present

### **DIRECTOR, COLLECTION DEVELOPMENT AND WORKFLOW SOLUTIONS, EASTERN US**

- Lead and direct a team of six to nine FTE
  - Oversee Sales Reps and Tech Services Reps on the Monograph (print and eBooks) side of the company
  - For a year, oversaw Account Services Managers on the Journals side of the company
- Oversee a portfolio of 24 states consisting of over 750 accounts
- Work with large consortia groups across the East, Midwest and Southeastern US on large scale monograph projects (print and electronic)
- Liaise between internal stakeholders (Operations, Technical Services, Accounting, IT, Project Management, and Senior Sales Management) and the field
- Lead bi-yearly territory planning and oversee big picture planning for the region
- Hire and train new Collection Development Managers and Library Technical Services reps

### **YBP Library Services** 2015 – 2017

### **SENIOR COLLECTION DEVELOPMENT MANAGER**

- In addition to the responsibilities below, assist in training new Collection Development Managers and serve as a mentor during their first year
- Serve as the senior point person on the East team
- Responsible for sales and retention at large four-year and research level library accounts in Midwestern and Southeastern States, as well as work with consortia
- Conduct large scale approval plan reviews and new plan writing
- Present and train at company sales meetings, industry conferences, and consortia gatherings
- Promoted to Director of Sales in June 2017

### **YBP Library Services** 2008 – 2015

### **COLLECTION DEVELOPMENT MANAGER**

- Main point of contact as the consultative sales representative for 65-75 University Libraries in the Midwest and Southeastern United States
- Consult with collection development and technical services departments at comprehensive four year and research level libraries; identify which services are best fit at accounts
- Consult and assist with the acquisition of print and electronic content including, but not limited to ongoing management of existing approval plans; write new approval plans; diagnostic approval plan work; Demand Driven Acquisitions; eContent/Consortia groups; library collection development; ILS integrations; streamline acquisitions workflows
- Provide support for approval and database related questions
- Conduct regular webinars, one-on-one training, and group training with librarians and faculty and presentations with library partners at major

conferences

- Work with internal stakeholders to provide feedback from the field
- During the Blackwell North America Transition, assisted in the training of new Collection Development Managers, profile writing, and the transitioning of accounts to YBP in 9 states
- Promoted to Senior Collection Development Manager in May 2015

**University of  
Southern  
Mississippi**  
2006 – 2008

#### **BIBLIOGRAPHIC SPECIALIST**

- Supervised 3-4 student workers in the physical processing area of Technical Services
- Hired, managed and evaluated student workers each semester
- Assisted with serials check in; preservation of special collections; copy cataloging; original cataloging of thesis and dissertations; and microfiche copy and original cataloging

### **EDUCATION**

**University of  
Southern  
Mississippi**  
2006 – 2008

#### **MASTER OF LIBRARY AND INFORMATION SCIENCE**

Concentration: Technical Services and Cataloging

**University of  
Southern  
Mississippi**  
2002 – 2006

#### **BACHELOR OF LIBRARY AND INFORMATION SCIENCE**

Major: Library and Information Science

Minor: English

### **PUBLICATIONS**

#### ARTICLES AND CHAPTERS

Fast, A., Garskof, J., Oakes, M. and Way, D. "Throwing Back the Curtain: Getting Candid about Negotiating and the Value of the Library-Vendor Relationship." *Charleston Voices: Perspectives from the 2018 Charleston Conference*. Ed. Meyer, L.. Sullivan's Island, SC: Against the Grain (Media), LLC, 2019. 103-119.

Fast, A. and Way, D. (2019). "Efficiency, Automation and the Continued Evolution of Collection Development." *Against the Grain* 31(2): 1, 10.

Bailey, A. (2018). "The Increasing Importance of Automation in Developing and Managing 21<sup>st</sup> Century Library Collections." *Charleston Voices: The Impacts of Automation on the Future of Monographic Collection Development*.

Bailey, A. (June, 2018). "Collection Development from the Library Services Vendor's Point of View." *Against the Grain*, 30(3), 58.

Bailey, A., Crawford, L., Daniels, J., Eichman, C., and Roth, P. (April, 2018). "Conversations: Seeing the Relationship from the Flip Side." *Against the Grain*, 30(2): 19-20.

Bailey, A., Royse, M., Thomas, D., and Watson, G. "Partnering for Patron-Driven Acquisitions: What you need to know." *Charleston Conference Proceedings 2011*. Ed. Strauch, K. P., Hinds, L. H., & Bernhardt, B.. West Lafayette, Indiana: Purdue University Press, 2012. 590-594.

#### BOOK REVIEWS

- Bailey, A. (June, 2018). Review of *Marketing Services and Resources in Information Organizations*, by Yi, Z. *Against the Grain*, 30(3), 44.
- Bailey, A. (February, 2018). Review of *Renew Yourself: A Six-Step Plan for More Meaningful Work*, by Hakala-Ausperk, C. *Against the Grain*, 30(1), 41.
- Bailey, A. (December, 2017). Review of *Capturing our Stories: An Oral History of Librarianship in Translation*, by Smith, A. A. *Against the Grain*, 29(6), 42.
- Bailey, A. (November, 2017). Review of *Digital Curation*, by Oliver, G., and Harvey, R. *Against the Grain*, 29(4), 58.
- Bailey, A. (September, 2017). Review of *Effective Difficult Conversations: A Step-by-Step Guide*, by Darling, A., and Soehner, C. *Against the Grain*, 29(4), 30.
- Bailey, A. (June, 2017). Review of *Library Improvement through Data Analytics*, by Farmer, L. S. J., and Safer, A. M. *Against the Grain*, 29(3), 37.
- Bailey, A. (April, 2017). Review of *Acquisitions: Core Concepts and Practices*, by Holden, J. *Against the Grain*, 29(2), 41.
- Bailey, A. (February, 2017). Review of *Ace the Interview, Land a Librarian Job*, by O'Hanlon, R. *Against the Grain*, 29(1), 49.
- Bailey, A. (January, 2017). Review of *The New Librarianship Field Guide*, by Lankes, R. D. *Against the Grain*, 28(6), 35.
- Bailey, A. (November, 2016). Review of *How Libraries Should Manage Data: Practical Guidance on how, with Minimum Resources, to get the Best from your Data*, by Cox, B. *Against the Grain*, 28(3), 44.
- Bailey, A. (September, 2016). Review of *Myth and Magic of Library Systems*, by Kelley, K. *Against the Grain*, 28(4), 59.
- Bailey, A. (April, 2016). Review of *Marketing the 21<sup>st</sup> Century Library: The Time is Now*, by Lucas-Alfieri, D. *Against the Grain*, 28(2), 34.
- Bailey, A. (February, 2016). Review of *Marketing Moxie for Librarians: Fresh Ideas, Proven Techniques, and Innovative Approaches*, by Watson-Lakamp, P. *Against the Grain*, 28(1), 42.

#### OTHER

Fast, A. and Way, D. (2019) *Against the Grain. Special Issue: Efficiency, Automation and the Continued Evolution of Collection Development*. 31(2) (Issue Guest Co-editor)

#### **PRESENTATIONS**

- Bailey, A. and Way, D. (November, 2018) Views from the Penthouse. ATG Penthouse Suite Interviews.
- Bailey, A., Garskof, J., Oakes, M. and Way, D. (November, 2018) Throwing Back the Curtain: A Candid Conversation about Negotiating. Charleston Conference, Charleston, SC.
- Bailey, A., Beaubien, S., and Wedig, E. (March, 2017) What's the Right Mix?: A Holistic Approach to Collection Development. [Video Webinar]. Library Journal Webinar Series.
- Bailey, A., Eichman, C., and Novak, D. (November, 2017) No MLS? No Problem; Acquisitions Essentials for the PhD Specialist. Charleston Conference, Charleston, SC.
- Arthur, A., Bailey, A., and Walker, K. (October, 2017) From Acquisition to Discovery to Usage: How Collection Development Impacts Discovery and UX. EBSCO User Group, Salt Lake City, UT.
- Bailey, A., Royse, M., Thomas, D., and Watson, G. (November, 2011) Partnering for Patron-Driven Acquisitions. Charleston Conference, Charleston, SC.
- Bailey, A. (2008) Using GOBI's Consortia and Peer Reporting Tools for a Stronger Collection. MAALL Conference, Fayetteville, AR.



## **SKILLS**

- Experience working interfacing with various library systems (Innovative, Sirsi, ExLibris, WorldShare, Koha, FOLIO)
- Excellent written and oral communication skills
- Ability to prioritize work with competing demands/multi-task efficiently and meet multiple deadlines
- Can quickly pick up new technologies and efficiently use them
- Excellent customer service and interpersonal skills; ability to collaborate with colleagues and faculty
- Very knowledgeable about the publishing industry (eBooks and print books), current trends in publishing and models for collections, and emerging monograph collections models

## **PROFESSIONAL DEVELOPMENT**

Additional Coursework: Wayne State University, Detroit, MI, 2010-2011

- Information Technology
- Database Concepts and Applications for Librarians

## **PROFESSIONAL SERVICE AND AFFILIATIONS**

American Library Association Member (2017-present)

Association for Library Collections and Technical Services Member

- New Membership Committee, AS Rep (2018-2020)
- ALCTS Mentoring Program, Mentor (2018-2020)

YBP Library Services, Approval Plan Committee, (2016-2017)

## **KEY AND NOTABLE ACCOMPLISHMENTS**

- Promoted to take over as Director, Collection Development and Workflow Solutions for the Eastern and Central/Southeastern US in July 2019
- Co-edited an issue of Against the Grain on current trends in monographic collection development, April 2019
- Promotion to Director, Collection Development and Workflow Solutions for the Central US, 2017
- Promotion to Senior Collection Development Manager for the Eastern US Team, 2015
- Largest Territory Growth, 2011 and 2013
- Successfully transitioned and trained over 50 libraries during the migration of Blackwell Library Services libraries to YBP; helped train three new Collection Development Managers

# ALYSE CAMUS

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## EDUCATION

<b>Indiana University</b> – <i>Bloomington, Indiana</i>	May 2019
MLS – School of Informatics, Computing, and Engineering	
MA – Russian and East European Institute	
<b>University of Texas</b> – <i>Austin, Texas</i>	June 2014
BA – Russian and East European Studies / American Studies	

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## RELEVANT EXPERIENCE

<b>Collection Development Manager</b>	July 2019 – Present
<i>GOBI Library Solutions</i>	
<ul style="list-style-type: none"><li>▪ Partner with academic libraries throughout Kentucky, North and South Carolina, and Virginia to assist with collection development and library workflow services.</li><li>▪ Write and maintain approval plans, help manage evidence-based and demand driven acquisition programs, and coordinate consortial projects.</li></ul>	
<b>International and Area Studies Intern</b>	August – December 2018
<i>Duke University Libraries</i>	
<ul style="list-style-type: none"><li>▪ Coordinated and planned digitization initiative using collection analysis to identify over 500 unique Russian language monographs for addition to HathiTrust.</li><li>▪ Presented findings at department meetings, made recommendations and suggestions for future collection development initiatives.</li></ul>	
<b>Public Services Assistant</b>	August 2017 – May 2018
<i>Indiana University Libraries</i>	
<ul style="list-style-type: none"><li>▪ Provided quick and friendly assistance in-person, over the phone, and via web chat by performing reference interviews with students and faculty to address all types of research queries.</li><li>▪ Assisted patrons with the use of print and digital resources by teaching how to navigate online catalogs and conduct database searches.</li></ul>	
<b>Slavic Collections Graduate Assistant</b>	August 2016 – May 2017
<i>Indiana University Libraries</i>	
<ul style="list-style-type: none"><li>▪ Assisted in collection development, database appraisal, and approval plan evaluation.</li><li>▪ Facilitated international exchange programs with institutions in over 15 countries.</li><li>▪ Managed collections' webpage by verifying information, updating, and creating subject guides and digital exhibitions.</li></ul>	
<b>Public Services Supervisor</b>	May 2015 – June 2016
<i>Pepperdine University Libraries</i>	
<ul style="list-style-type: none"><li>▪ Oversaw daily library services for students, faculty, and public patrons and implemented new workflows for circulating reserves, lost and found items, and emergencies.</li><li>▪ Developed and promoted library events, activities, and services by coordinating with appropriate departments, managing event budgets, and designing posters and displays.</li></ul>	

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## SKILLS

**Languages:** Czech (Intermediate), Hungarian (Advanced), Russian (Intermediate), German (Beginner)

**Office Systems:** Microsoft Office suite, Google suite

**Library Systems:** Workflows, OCLC

**Cataloging:** DDC, LCSH, MARC, OCLC Connexion, RDA

**Social Platforms:** Facebook, Instagram, Listserv, Twitter, Wordpress

M|G



<https://www.linkedin.com/in/moriah-guy-92879395>

<http://moriahguy.com/>

## ATTRIBUTES

Driven  
Honest  
Hardworking  
Loyal  
Focused  
Leader  
Team mate

## TECHNICAL SKILLS

Microsoft Office Suite  
WebEx  
Social Media Marketing  
Google Applications  
Koha  
Computer Trouble Shooting  
Statistical Analysis Software  
Sierra  
W.M.S. and W.C.M.  
Gobi  
Alma  
Horizon  
MARC EDIT

## MORIAH GUY

## Library and Information Science

## PROFESSIONAL PROFILE

With three years of library experience working to lead a multitude of projects, including over 400 library ILS migrations, opening day collections, and technical service projects. I have a wealth of experiences and knowledge that will help me provide Librarianship with a higher standard of collaborative knowledge, diversity, and self-driven positivity. This along with background of research development and statistical analysis have helped me become a professional who loves research and increasing the knowledge of librarianship.

## EDUCATION

## MASTER'S DEGREE

**Management of Library and Information Science**  
University of Southern California

2016– 2018

## BACHELOR OF SCIENCE

**Biology, Zoology**  
Southern Utah University

2010 – 2014

## AWARDS AND HONORS

## NEW LEADER IN LIBRARY TECHNICAL SERVICES AWARD

California Library Association Library Technical Services Interest Group  
2018

## ALA-SC PRESIDENT

University of Southern California MMLIS ALA Chapter  
April 2017- April 2018

## ELUNA 2018 and 2019 PRESENTER

Gobi collaboration with Oregon State University and University of Oregon  
May 2018

## WALTER-MAXWELL-GIBSON RESEARCH GRANT

Southern Utah University  
Awarded Spring 2013

## SKAGGS RESEARCH FELLOWSHIP

Southern Utah University  
Awarded January 2013

## 2014 FESTIVAL OF EXCELLENCE

Southern Utah University  
Asked to speak November 2014

## ATTACHMENT A

### OFFEROR DATA SHEET

#### TO BE COMPLETED BY OFFEROR

1. QUALIFICATIONS OF OFFEROR: Offerors must have the capability and capacity in all respects to fully satisfy the contractual requirements.
2. YEARS IN BUSINESS: Indicate the length of time you have been in business providing these types of goods and services.

Years 47 Months 11

3. REFERENCES: Indicate below a listing of at least five (5) organizations, either commercial or governmental/educational, that your agency is servicing. Include the name and address of the person the purchasing agency has your permission to contact.

Client	Length of Service	Address	Contact Person/Phone #
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4. List full names and addresses of Offeror and any branch offices which may be responsible for administering the contract.

Yankee Book Peddler, Inc. dba: GOBI Library Solutions from EBSCO  
999 Maple Street, Contoocook, New Hampshire 03229

5. RELATIONSHIP WITH THE COMMONWEALTH OF VIRGINIA: Is any member of the firm an employee of the Commonwealth of Virginia who has a personal interest in this contract pursuant to the [CODE OF VIRGINIA](#), SECTION 2.2-3100 – 3131?

[ ] YES [X] NO

IF YES, EXPLAIN: \_\_\_\_\_

## ATTACHMENT B

Small, Women and Minority-owned Businesses (SWaM) Utilization Plan

**Offeror Name: Yankee Book Peddler, Inc. dba: GOBI Library Solutions from EBSCO**

**Preparer Name:** Hannah Gage

**Date: March 4, 2020**

Is your firm a **Small Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes \_\_\_\_\_ No X \_\_\_\_\_

If yes, certification number: \_\_\_\_\_ Certification date: \_\_\_\_\_

Is your firm a **Woman-owned Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes \_\_\_\_\_ No X \_\_\_\_\_

If yes, certification number: \_\_\_\_\_ Certification date: \_\_\_\_\_

Is your firm a **Minority-Owned Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes \_\_\_\_\_ No X \_\_\_\_\_

If yes, certification number: \_\_\_\_\_ Certification date: \_\_\_\_\_

Is your firm a **Micro Business** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes \_\_\_\_\_ No X \_\_\_\_\_

If yes, certification number: \_\_\_\_\_ Certification date: \_\_\_\_\_

**Instructions:** *Populate the table below to show your firm's plans for utilization of small, women-owned and minority-owned business enterprises in the performance of the contract. Describe plans to utilize SWaMs businesses as part of joint ventures, partnerships, subcontractors, suppliers, etc.*

**Small Business:** "Small business " means a business, independently owned or operated by one or more persons who are citizens of the United States or non-citizens who are in full compliance with United States immigration law, which, together with affiliates, has 250 or fewer employees, or average annual gross receipts of \$10 million or less averaged over the previous three years.

**Woman-Owned Business Enterprise:** A business concern which is at least 51 percent owned by one or more women who are U.S. citizens or legal resident aliens, or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more women, and whose management and daily business operations are controlled by one or more of such individuals. **For purposes of the SWAM Program, all certified women-owned businesses are also a small business enterprise.**

**Minority-Owned Business Enterprise:** A business concern which is at least 51 percent owned by one or more minorities or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more minorities and whose management and daily business operations are controlled by one or more of such individuals. **For purposes of the SWAM Program, all certified minority-owned businesses are also a small business enterprise.**

**Micro Business** is a certified Small Business under the SWaM Program and has no more than twenty-five (25) employees AND no more than \$3 million in average annual revenue over the three-year period prior to their certification.

**All small, women, and minority owned businesses must be certified by the Commonwealth of Virginia Department of Small Business and Supplier Diversity (SBSD) to be counted in the SWAM program. Certification applications are available through SBSD at 800-223-0671 in Virginia, 804-786-6585 outside Virginia, or online at <http://www.sbsd.virginia.gov/> (Customer Service).**

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Appendix #2- Combined Expenditure by VASCUPP Members  
January 29, 2019 through January 28, 2020

Account Name	Account Number	Sum SELLING PRICE	SUBCATEGORY	Print total	E total	E Incentive?	E Incentive Amount
Blue Ridge Community College	11391	\$9,048	1-Print Firm				
<b>Blue Ridge Community College</b>		<b>\$9,048</b>		<b>\$9,048</b>	<b>\$0</b>	<b>No</b>	
Bridgewater College	1763	\$35,637	1-Print Firm				
Bridgewater College	1763	\$70	20-Print Approval Slips				
Bridgewater College	1763	\$0	80-Continuations				
<b>Bridgewater College</b>		<b>\$35,707</b>		<b>\$35,707</b>	<b>\$0</b>	<b>No</b>	
Central Virginia Community College	6999	\$13,854	1-Print Firm				
Central Virginia Community College	6999	\$492	1-Tech Services/BP				
<b>Central Virginia Community College</b>		<b>\$14,346</b>		<b>\$13,854</b>	<b>\$0</b>	<b>No</b>	
Christopher Newport University	1240	\$62,442	1-Print Firm				
Christopher Newport University	1240	\$2,786	1-Services/Shelf-Ready/Other				
Christopher Newport University	1240	\$0	20-Print Approval				
Christopher Newport University	1240	\$14,373	50-eBook Firm				
Christopher Newport University	1240	\$9,133	80-Continuations				
<b>Christopher Newport University</b>		<b>\$88,734</b>		<b>\$71,575</b>	<b>\$14,373</b>	<b>No</b>	
College of William and Mary	3460	\$30,957	1-Print Firm				
College of William and Mary	3460	\$50,125	1-Services/Shelf-Ready/Other				
College of William and Mary	3460	\$4,607	20-Print Approval				
College of William and Mary	3460	\$192,087	21-Print Approval Slips				
College of William and Mary	3460	\$15,541	50-eBook Firm				
College of William and Mary	3460	\$75,539	50-eBook Approval Slips				
College of William and Mary	3460	\$833	50-eBook Approval Book Shelf				
College of William and Mary	3460	\$31,402	50-DDA				
College of William and Mary	3460	\$6,243	80-Continuations				
<b>College of William and Mary</b>		<b>\$407,334</b>		<b>\$233,894</b>	<b>\$123,315</b>	<b>Yes</b>	<b>\$3,082.88</b>
College of William and Mary, Law	8193	\$11,791	1-Print Firm				
College of William and Mary, Law	8193	\$2,827	1-Services/Shelf-Ready/Other				



College of William and Mary, Law	8193	\$0	20-Print Approval				
College of William and Mary, Law	8193	\$79,972	21-Print Approval Slips				
College of William and Mary, Law	8193	\$9,290	80-Continuations				
<b>College of William and Mary, Law</b>		<b>\$103,880</b>		<b>\$101,052</b>	<b>\$0</b>	<b>No</b>	
Danville Community College	6897	\$23,312	1-Print Firm				
Danville Community College	6897	\$2,797	1-Services/Shelf-Ready/Other				
Danville Community College	6897	\$0	20-Print Approval				
Danville Community College	6897	\$1,399	50-eBook Firm				
Danville Community College	6897	\$5,142	80-Continuations				
<b>Danville Community College</b>		<b>\$32,650</b>		<b>\$28,454</b>	<b>\$1,399</b>	<b>No</b>	
George Mason University	1440	\$27,502	1-Print Firm				
George Mason University	1440	\$36,482	1-Services/Shelf-Ready/Other				
George Mason University	1440	\$445,496	20- Print Approval				
George Mason University	1440	\$307,054	21- Approval Slips				
George Mason University	1440	\$98,609	50-eBook Approval Slips				
George Mason University	1440	\$221,903	50-eBook Approval Book Shelf				
George Mason University	1440	\$13,491	50-eBook Firm				
George Mason University	1440	\$29,636	80-Continuations				
<b>George Mason University</b>		<b>\$1,180,173</b>		<b>\$809,687</b>	<b>\$334,003</b>	<b>Yes</b>	<b>\$8,350.08</b>
George Mason University, Law	5193	\$7,913	1-Print Firm				
George Mason University, Law	5193	\$0	20- Print Approval				
George Mason University, Law	5193	\$10,708	21- Approval Slips				
George Mason University, Law	5193	\$0	80- Continuations				
<b>George Mason University, Law</b>		<b>\$18,621</b>		<b>\$18,621</b>	<b>\$0</b>	<b>No</b>	
Germanna Community College	10699	\$3,349	1-Print Firm				
Germanna Community College	10699	\$8,204	50- eBook Firm				
<b>Germanna Community College</b>		<b>\$11,553</b>		<b>\$3,349</b>	<b>\$8,204</b>	<b>No</b>	
Hampden-Sydney College	1520	\$0	1-Print Firm				
Hampden-Sydney College	1520	\$0	20-Print Approval Slips				
Hampden-Sydney College	1520	\$3,459	80-Continuations				
<b>Hampden-Sydney College</b>		<b>\$3,459</b>		<b>\$3,459</b>	<b>\$0</b>	<b>No</b>	

Hollins University	5217	\$20,863	1-Print Firm				
Hollins University	5217	\$16,563	1-Services/Shelf-Ready/Other				
Hollins University	5217	\$0	20-Print Approval				
Hollins University	5217	\$35,814	21-Print Approval Slips				
Hollins University	5217	\$9,270	50-eBook Firm				
Hollins University	5217	\$8,334	50-eBook Approval Slips				
Hollins University	5217	\$5,529	80-Continuations				
<b>Hollins University</b>		<b>\$96,373</b>		<b>\$62,206</b>	<b>\$17,604</b>	<b>No</b>	
James Madison University	5239	\$42,885	1-Print Firm				
James Madison University	5239	\$2,204	1-Services/Shelf-Ready/Other				
James Madison University	5239	\$3,319	81-e Collection/Package				
<b>James Madison University</b>		<b>\$48,408</b>		<b>\$42,885</b>	<b>\$3,319</b>	<b>No</b>	
John Tyler Community College	10919	\$8,742	1-Print Firm				
John Tyler Community College	10919	\$0	1-Services/Shelf-Ready/Other				
<b>John Tyler Community College</b>		<b>\$8,742</b>		<b>\$8,742</b>	<b>\$0</b>	<b>No</b>	
Longwood University	5768	\$17,469	1-Print Firm				
Longwood University	5768	\$0	1-Services/Shelf-Ready/Other				
Longwood University	5768	\$0	20-Print Approval				
Longwood University	5768	\$661	21-Print Approval Slips				
Longwood University	5768	\$4,973	50-eBook Firm				
Longwood University	5768	\$8,992	80-Continuations				
<b>Longwood University</b>		<b>\$32,095</b>		<b>\$27,122</b>	<b>\$4,973</b>	<b>No</b>	
Lord Fairfax Community College	4961	\$10,727	1-Print Firm				
Lord Fairfax Community College	4961	\$4,226	1-Services/Shelf-Ready/Other				
Lord Fairfax Community College	4961	\$0	20-Print Approval				
Lord Fairfax Community College	4961	\$35,071	21-Print Approval Slips				
Lord Fairfax Community College	4961	\$1,924	80-Continuations				
<b>Lord Fairfax Community College</b>		<b>\$51,948</b>		<b>\$47,723</b>	<b>\$0</b>	<b>No</b>	
Lynchburg College	5932	\$1,874	1-Print Firm				
Lynchburg College	5932	\$1,602	21-Print Approval Slips				
Lynchburg College	5932	\$2,267	50-eBook Firm				

Lynchburg College	5932	\$503	50-eBook Approval Slips				
Lynchburg College	5932	\$0	80-Continuations				
<b>Lynchburg College</b>		<b>\$6,246</b>		<b>\$3,475</b>	<b>\$2,770</b>	<b>No</b>	
Mountain Empire Community College	6898	\$455	1-Services/Shelf-Ready/Other				
<b>Mountain Empire Community College</b>		<b>\$455</b>		<b>\$0</b>	<b>\$0</b>	<b>No</b>	
Norfolk State University	2090	\$8,207	1-Print Firm				
Norfolk State University	2090	\$584	1-Services/Shelf-Ready/Other				
Norfolk State University	2090	\$3,941	21-Print Approval Slips				
Norfolk State University	2090	\$3,849	50-eBook Firm				
Norfolk State University	2090	\$5,234	50-eBook Approval Slips				
Norfolk State University	2090	\$9,505	50-eBook Series				
Norfolk State University	2090	\$82	50-STL				
Norfolk State University	2090	\$4,178	80-Continuations				
<b>Norfolk State University</b>		<b>\$35,580</b>		<b>\$16,326</b>	<b>\$18,670</b>	<b>No</b>	
Northern Virginia Community College/Annandale	5413	\$304,908	1-Print Firm				
Northern Virginia Community College/Annandale	5413	\$14,654	1-Services/Shelf-Ready/Other				
Northern Virginia Community College/Annandale	5413	\$101,426	50-eBook Firm				
Northern Virginia Community College/Annandale	5413	\$0	50-eBook Approval Slips				
Northern Virginia Community College/Annandale	5413	\$12,160	80-Continuations				
<b>Northern Virginia Community College/Annandale</b>		<b>\$433,148</b>		<b>\$317,069</b>	<b>\$101,426</b>	<b>Yes</b>	<b>\$2,535.65</b>
Old Dominion University	5426	\$17,594	1-Print Firm				
Old Dominion University	5426	\$24,613	1-Services/Shelf-Ready/Other				
Old Dominion University	5426	\$31,777	20-Print Approval				
Old Dominion University	5426	\$69,634	21-Print Approval Slips				
Old Dominion University	5426	\$17,439	50-eBook Firm				
Old Dominion University	5426	\$42,457	50-DDA				

Old Dominion University	5426	\$39,182	50-STL				
Old Dominion University	5426	\$23,904	50-eBook Approval				
Old Dominion University	5426	\$5,026	50-eBook Approval Book Shelf				
Old Dominion University	5426	\$49,712	50-eBook Approval Slips				
Old Dominion University	5426	\$5,280	80-Continuations				
<b>Old Dominion University</b>		<b>\$326,618</b>		<b>\$124,284</b>	<b>\$177,720</b>	<b>Yes</b>	<b>\$4,443.00</b>
Paul D. Camp Community College	12268	\$39	1- Print Firm				
<b>Paul D. Camp Community College</b>		<b>\$39</b>		<b>\$39</b>	<b>\$0</b>	<b>No</b>	
Radford University	2322	\$3,860	1-Print Firm				
Radford University	2322	\$2,812	1-Services/Shelf-Ready/Other				
Radford University	2322	\$53,537	20-Print Approval				
Radford University	2322	\$3,516	21-Print Approval Slips				
Radford University	2322	\$1,387	50-eBook Firm				
Radford University	2322	\$8,253	50-eBook Approval Book Shelf				
Radford University	2322	\$15,783	50-DDA				
Radford University	2322	\$2,349	50-eBook Approval Slips				
<b>Radford University</b>		<b>\$91,497</b>		<b>\$60,912</b>	<b>\$27,772</b>	<b>No</b>	
Randolph-Macon College	8063	\$8,550	1-Print Firm				
Randolph-Macon College	8063	\$23,972	21-Print Approval Slips				
Randolph-Macon College	8063	\$1,762	50-eBook Firm				
Randolph-Macon College	8063	\$908	50-eBook Approval Slips				
Randolph-Macon College	8063	\$2,463	81-e Collection/Package				
Randolph-Macon College	8063	\$699	80-Continuations				
<b>Randolph-Macon College</b>		<b>\$38,354</b>		<b>\$33,221</b>	<b>\$5,133</b>	<b>No</b>	
Rappahannock Community College	5462	\$1,702	1-Print Firm				
Rappahannock Community College	5462	\$196	1-Services/Shelf-Ready/Other				
<b>Rappahannock Community College</b>		<b>\$1,898</b>		<b>\$1,702</b>	<b>\$0</b>	<b>No</b>	
Richard Bland College	13045	\$0	1-Print Firm				
<b>Richard Bland College</b>		<b>\$0</b>		<b>\$0</b>	<b>\$0</b>	<b>No</b>	
Roanoke College	5472	\$4,876	1-Print Firm				

Roanoke College	5472	\$0	21- Print Approval Slips				
Roanoke College	5472	\$971	50-eBook Firm				
Roanoke College	5472	\$6,097	80-Continuations				
<b>Roanoke College</b>		<b>\$11,944</b>		<b>\$10,973</b>	<b>\$971</b>	<b>No</b>	
Southwest Virginia Community College	6923	\$12,444	1-Print Firm				
Southwest Virginia Community College	6923	\$851	80-Continuations				
<b>Southwest Virginia Community College</b>		<b>\$13,295</b>		<b>\$13,295</b>	<b>\$0</b>	<b>No</b>	
Thomas Nelson Community College	5725	\$0	1-Print Firm				
Thomas Nelson Community College	5725	\$0	1-Services/Shelf-Ready/Other				
<b>Thomas Nelson Community College</b>		<b>\$0</b>		<b>\$0</b>	<b>\$0</b>	<b>No</b>	
Tidewater Community College	1894	\$82,982	1-Print Firm				
Tidewater Community College	1894	\$11,429	1-Services/Shelf-Ready/Other				
Tidewater Community College	1894	\$453	21-Print Approval Slips				
Tidewater Community College	1894	\$22,003	50-eBook Firm				
Tidewater Community College	1894	\$0	50-eBook Approval Slips				
<b>Tidewater Community College</b>		<b>\$116,867</b>		<b>\$83,435</b>	<b>\$22,003</b>	<b>No</b>	
University of Mary Washington	5297	\$25,245	1-Print Firm				
University of Mary Washington	5297	\$76	1-Services/Shelf-Ready/Other				
University of Mary Washington	5297	\$0	20- Print Approval				
University of Mary Washington	5297	\$59,324	21-Print Approval Slips				
University of Mary Washington	5297	\$2,922	50-DDA				
University of Mary Washington	5297	\$1,213	50-eBook Firm				
University of Mary Washington	5297	\$326	50-eBook Approval Slips				
University of Mary Washington	5297	\$609	50-eCollection/Package				
University of Mary Washington	5297	\$10,322	80-Continuations				
<b>University of Mary Washington</b>		<b>\$100,037</b>		<b>\$94,891</b>	<b>\$5,071</b>	<b>No</b>	
University of Richmond	8118	\$51,647	1-Print Firm				
University of Richmond	8118	\$16,809	1-Services/Shelf-Ready/Other				
University of Richmond	8118	\$85,360	20-Print Approval				
University of Richmond	8118	\$62,433	21-Print Approval Slips				
University of Richmond	8118	\$29,700	50-EBA				

University of Richmond	8118	\$18,922	50-eBook Firm				
University of Richmond	8118	\$2,251	50-eBook Approval				
University of Richmond	8118	\$45,091	50-eBook Approval Slips				
University of Richmond	8118	\$40,365	50-DDA				
University of Richmond	8118	\$4,615	80-Continuations				
<b>*University of Richmond</b>		<b>\$357,193</b>		<b>\$204,054</b>	<b>\$136,330</b>	<b>Yes</b>	<b>\$3,408.25</b>
University of Richmond Law	8148	\$11,864	1-Print Firm				
University of Richmond Law	8148	\$1,673	1-Services/Shelf-Ready/Other				
University of Richmond Law	8148	\$28,428	20-Print Approval				
University of Richmond Law	8148	\$19,781	21-Print Approval Slips				
University of Richmond Law	8148	\$16,162	80-Continuations				
University of Richmond Law	8148	\$0	50-eBook STL				
University of Richmond Law	8148	\$0	50-eBook Firm				
University of Richmond Law	8148	\$0	50-eBook Approval Slips				
University of Richmond Law	8148	\$9,388	50-DDA				
<b>*University of Richmond Law</b>		<b>\$87,296</b>		<b>\$76,236</b>	<b>\$9,388</b>	<b>No</b>	
University of Virginia	3500	\$7,723	1-Print Firm				
University of Virginia	3500	\$896	21-Print Approval Slips				
University of Virginia	3500	\$3,522	50-eBook Firm				
University of Virginia	3500	\$2,592	51-eBook Approval Slips				
<b>University of Virginia</b>		<b>\$14,733</b>		<b>\$8,619</b>	<b>\$6,114</b>	<b>No</b>	
University of Virginia, Law	5560	-\$1,977	1-Print Firm				
University of Virginia, Law	5560	\$0	1-Services/Shelf-Ready/Other				
University of Virginia, Law	5560	\$22,234	20-Print Approval				
University of Virginia, Law	5560	\$14,252	21-Print Approval Slips				
University of Virginia, Law	5560	\$180	50-eBook Firm				
University of Virginia, Law	5560	\$85	50-eBook Approval Slips				
University of Virginia, Law	5560	\$5,078	80-Continuations				
<b>University of Virginia, Law</b>		<b>\$39,852</b>		<b>\$39,587</b>	<b>\$265</b>	<b>No</b>	
University of Virginia at Wise	1504	\$0	1- Print Firm				
University of Virginia at Wise	1504	\$4,516	80-Continuations				
<b>University of Virginia at Wise</b>		<b>\$4,516</b>		<b>\$4,516</b>	<b>\$0</b>	<b>No</b>	

Virginia Commonwealth University	3380	\$41,193	1- Print Firm				
Virginia Commonwealth University	3380	\$38,787	1-Services/Shelf-Ready/Other				
Virginia Commonwealth University	3380	\$360,658	20-Print Approval				
Virginia Commonwealth University	3380	\$244,704	21-Print Approval Slips				
Virginia Commonwealth University	3380	\$36,666	50-eBook Firm				
Virginia Commonwealth University	3380	\$61,385	50-eBook Approval				
Virginia Commonwealth University	3380	\$175,933	50-eBook Approval Slips				
Virginia Commonwealth University	3380	\$75,726	80-Continuations				
<b>Virginia Commonwealth University</b>		<b>\$1,035,052</b>		<b>\$722,280</b>	<b>\$273,984</b>	<b>Yes</b>	<b>\$6,849.60</b>
Virginia Highland Community College	11420	\$991	1- Print Firm				
Virginia Highland Community College	11420	\$304	80-Continuations				
<b>Virginia Highland Community College</b>		<b>\$1,295</b>		<b>\$1,295</b>	<b>\$0</b>	<b>No</b>	
Virginia Military Institute	3390	\$45,668	1-Print Firm				
Virginia Military Institute	3390	\$440	1-Services/Shelf-Ready/Other				
Virginia Military Institute	3390	\$2,671	50-eBook Firm				
Virginia Military Institute	3390	\$5,500	50-EBA				
Virginia Military Institute	3390	\$7,017	80-Continuations				
<b>Virginia Military Institute</b>		<b>\$61,296</b>		<b>\$52,685</b>	<b>\$8,171</b>	<b>No</b>	
Virginia Polytechnic Institute	3590	\$34,533	1-Print Firm				
Virginia Polytechnic Institute	3590	\$3,007	1-Services/Shelf-Ready/Other				
Virginia Polytechnic Institute	3590	\$3,607	20-Print Approval				
Virginia Polytechnic Institute	3590	\$17,657	21-Print Approval Slips				
Virginia Polytechnic Institute	3590	\$62,963	50-eBook Firm				
Virginia Polytechnic Institute	3590	\$5,426	50-DDA				
Virginia Polytechnic Institute	3590	\$83,082	50-eBook Approval Slip				
Virginia Polytechnic Institute	3590	\$86,120	50-eBook Approval Book Shelf				
Virginia Polytechnic Institute	3590	\$12,254	50-STL				
Virginia Polytechnic Institute	3590	\$1,400	50-eSeries				
Virginia Polytechnic Institute	3590	\$291,165	51-eCollection/Package				
Virginia Polytechnic Institute	3590	\$6,462	80-Continuations				
<b>Virginia Polytechnic Institute</b>		<b>\$607,676</b>		<b>\$62,259</b>	<b>\$542,409</b>	<b>Yes</b>	<b>\$ 13,560.23</b>



Virginia State University	7966	\$1,610	1-Print Firm				
Virginia State University	7966	\$0	1-Services/Shelf-Ready/Other				
Virginia State University	7966	\$4,493	21-Print Approval Slips				
Virginia State University	7966	\$0	80-Continuations				
<b>Virginia State University</b>		<b>\$6,103</b>		<b>\$6,103</b>	<b>\$0</b>	<b>No</b>	
Virginia Wesleyan University	5556	\$7,636	1-Print Firm				
Virginia Wesleyan University	5556	\$455	1-Services/Shelf-Ready/Other				
Virginia Wesleyan University	5556	\$4,818	50-eBook Firm				
Virginia Wesleyan University	5556	\$10,202	51-eBook Collection/Package				
Virginia Wesleyan University	5556	\$30	80-Continuations				
<b>Virginia Wesleyan University</b>		<b>\$23,141</b>		<b>\$7,666</b>	<b>\$15,020</b>	<b>No</b>	
Wytheville Community College	2326	\$12,513	1-Print Firm				
<b>Wytheville Community College</b>		<b>\$12,513</b>		<b>\$12,513</b>	<b>\$0</b>	<b>No</b>	
<b>Grand totals 12-31-19</b>		<b>\$5,569,714</b>		<b>\$3,474,813</b>	<b>\$1,860,407</b>		<b>\$42,229.69</b>

## Appendix #3

### SECTION X – Pricing Schedule

The offeror shall provide pricing for all products and services included in proposal indicating one-time and on-going costs. The resulting contract will be cooperative, and pricing shall be inclusive for the attached Zone Map. Specifically, the offeror shall address the following:

#### A. For Print or Tangible Materials

1. Provide the discount structure to be applied to the publisher's list price. Specify how individual institutional volume would impact discounts. Confirm that the publisher's list price shall not be marked up in order to give a discount. Confirm that the proposed discount shall be firm for the entire period of the contract, and through any subsequent renewal periods.

The price base of all books supplied by GOBI Library Solutions will be the publisher's list price at the time of shipment, as shown on the publisher's invoice. GOBI Library Solutions confirms that we do not mark-up list price for any books, including ebooks. All material supplied will be priced according to GOBI Library Solutions' stated discount schedule, with certain exceptions as outlined in section A.2.

The discount proposed here will be firm for the length of the contract and through any subsequent renewal periods. We are pleased to extend the following pricing and discounts to VASCUPP members and any other Virginia higher education institutions that access this contract:

For the first year of the contract, the discount schedule shall be based on VASCUPP's approximate collective spend for 2019 and shall fall within the *Expenditures of \$5,000,000-\$6,999,999* range. For each subsequent year of the contract, annual expenditures of VASCUPP members, along with any other Virginia higher education Institution accessing this contract, cooperatively for the previous year, shall be combined to determine the appropriate discount schedule for the next contract year. Prior to the beginning of each contract year, GOBI Library Solutions will provide a report to James Madison University's Procurement that details the relevant previous years combined spend and indicates the discount schedule that will be applied for the upcoming contract year.

#### **Expenditures up to \$ 1,999,999 Discount off List Price**

Approval Plan US and UK (print) 17% US/ 7% UK, plus freight  
Firm Orders US and UK (print) 17% US/ 7% UK, plus freight  
Standing Orders (print) 8% US/ 5% UK, plus freight  
E-books on other platforms 0% (1% credit incentive\*)

#### **Expenditures of \$ 2,000,000-\$3,999,999 Discount off List Price**

Approval Plan US and UK (print) 18% US/ 8% UK, plus freight  
Firm Orders US and UK (print) 18% US/ 8% UK, plus freight  
Standing Orders (print) 9% US/ 6% UK, plus freight  
E-books on other platforms 0% (1.5% credit incentive\*)

#### **Expenditures of \$4,000,000-\$4,999,999 Discount off List Price**

Approval Plan US and UK (print) 19% US/ 9% UK, plus freight  
Firm Orders US and UK (print) 19% US/ 9% UK, plus freight

Standing Orders (print) 10% US/ 7% UK, plus freight  
E-books on other platforms 0% (2% credit incentive\*)

**Expenditures of \$5,000,000-\$6,999,999 Discount off List Price**

Approval Plan US and UK (print) 20% US/ 11% UK, plus freight  
Firm Orders US and UK (print) 20% US/ 11% UK, plus freight  
Standing Orders (print) 11% US/ 9% UK, plus freight  
E-books on other platforms 0% (2.5% credit incentive\*)

**Expenditures of \$7,000,000+ Discount off List Price**

Approval Plan US and UK (print) 20.5% US/ 11.5% UK, plus freight  
Firm Orders US and UK (print) 20.5% US/ 11.5% UK, plus freight  
Standing Orders (print) 11.5% US/ 9.5% UK, plus freight  
E-books on other platforms 0% (3% credit incentive\*)

\*GOBI Library Solutions' ebook credit incentive provides universities purchasing \$50,000 worth of ebooks from us in a given contract year with a credit (based on percentages outlined above) that shall be applied to any subsequent purchases at GOBI Library Solutions during the following contract year. The credit will be provided at the beginning of each year of the contract.

**2. Provide the method for computing discounts and/or service charges for the types of publishers, and material types.**

- When GOBI Library Solutions receives a short discount from any publisher, we add a 15% service fee to the publisher's list price, with a \$10 minimum and \$25 maximum.
- Discounts do not apply to titles from publishers on the "List Price Publishers" lists, whose books (including any and all imprints) we normally sell at list price (occasional service fee for short publisher discount).
- Discounts do not apply to titles that we import directly from overseas on a library's behalf. These are subject to the service fee noted above for short-discounted titles.
- Discounts do not apply to OP Choice titles.
- eBooks are exempt from regular discounts and without service fee. All ebooks are sold at publisher's list price and are not marked up.

**3. Provide a listing of any applicable charges for shipping and handling.**

GOBI Library Solutions will pay domestic freight costs for any institution, or library, purchasing through the VASCUPP contract, which is spending \$30,000 or more per year. For customers meeting this requirement shipping will be provided on a weekly basis. For the first year of the contract, shipping frequency will be based on individual institutions estimated yearly spend.

For any customer spending less than \$30,000 a year, shipping can either be provided on a biweekly shipping frequency, or the customer can choose to receive shipping on a weekly basis with the addition of a freight charge of 5% of the book invoice (excluding cataloging fees, processing fees, and electronic content). Expenditure will be reviewed annually, and shipping frequency/charges will be adjusted accordingly.

For books shipped from our warehouse in the UK a freight charge of 6% of the book invoice will apply.

A transportation surcharge of 0.25% (one-quarter of one percent) of the book invoice (excluding cataloging fees, processing fees, and electronic content) shall be added to domestic invoices if the customer is not currently paying a 5% freight charge. The minimum transportation surcharge will be \$1.00, and the maximum transportation surcharge shall be \$25.00 per invoice.

4. Provide the charge per volume for binding services.

GOBI Library Solutions offers a variety of strengthening, jacketing & binding treatments. Please refer to [Exhibit #11](#) for additional information regarding these services.

Pricing for binding services is as follows:

Binding Type	US	UK
Graphic Cover®	\$8.60	n/a
CopyCover®	\$8.60	n/a
Norlam®	\$10.86	n/a
Buckram/Cloth	n/a	£7.26
Picture Scan	n/a	£6.18

***Paperback Strengthening***

EasyCover® \$2.81/ £3.50

Easy Bind hinge reinforcement Add \$1.27/ Add £1.48

5. Provide cost per title for any services available for supplying MARC records at the point of request and/or with shipment.

GOBI Library Solutions provides MARC records at varying price ranges depending upon the level of services selected. Please refer to [Exhibit #11](#), *GOBI Library Solutions' Technical Services Price List* for the full range of prices and services.

6. Provide cost per title for processing services such as security strip placement, spine label production and placement, and property stamps.

GOBI Library Solutions is a full-service monograph vendor. Please refer to [Exhibit #11](#), *GOBI Library Solutions' Technical Services Price List* for the full range of prices and services.

7. Provide the average discounted selling price per volume for the last twelve (12) months for the combined VASCUPP schools and project the average cost per monograph to be supplied in the next fiscal year. Separate average costs per volume should be provided for each of the broad subject categories.

The average list price for 2019 for print books for the US was \$93.29 and £72.64 for the UK. eBook pricing varies significantly by subject area with a high of \$190.31 average price to customer for Technology titles and a low average price to customer of \$88.29 for World History titles.

Each year librarians ask GOBI Library Solutions for a forecast of the inflation rate of book prices. We do our best to consider our historical data, collect insight from buyers and publishers, and review general economic data when developing our forecast. Additional information about annual average book pricing may be found in our database GOBI where New Title Reports are also found.

**New Title Reports** in GOBI provide the library with an opportunity to learn of titles profiled at GOBI Library Solutions and their associated costs in a given time period, and to make comparisons with other periods. These reports are available to be customized by you under the "Approval Tools" tab on GOBI. By clicking on the US Reports link, for example, Library staff can see a variety of ways to organize the information such as permitting you to organize by publisher instead of subject. Staff can also include or exclude publishers by type, e.g. trade or university press, and to include or exclude imported titles. Information is available for the past five years.

8. [Provide any additional charges for special services such as rush orders.](#)

**RUSH**

GOBI Library Solutions provides free ground shipping for all Rush orders placed on GOBI. Rush delivery charges for next-day or second-day delivery are standard UPS charges for the delivery method selected.

Rush orders are sold at a 10% discount. The regular discount exceptions, as outlined in Paragraph 2 above, apply.

**Holdings Load Service**

Libraries can bolster GOBI's duplication detection by using GOBI Library Solutions' Library Holdings Load Service. By providing a file of ISBNs of your recent ordering history, GOBI Library Solutions will load the ISBNs into your library's GOBI account. When GOBI users land on a bibliographic record for a title your library owns, but was not acquired from GOBI Library Solutions, the notation "Already Owned by Library" will appear on the record. A duplication alert is issued when an order is placed on GOBI for any ISBN in the holdings file. These holdings are also available internally at GOBI Library Solutions for duplication control against approval shipments, as well as orders not placed through GOBI.

Three holdings loads per year are free. There is a \$515.00 charge beginning with the fourth load for an unlimited number of subsequent loads in any one year.

B. [For eBooks](#)

1. [Describe the methodology for determining ebook pricing across multiple ebook publishers /aggregators.](#)

GOBI Library Solutions does not mark up from the publisher's list price for ebooks that are sold through GOBI.

2. Specify institutional level volume discounts for providing access to multiple resources. Provide opportunities for increasing institutional level volume discounts.

Please refer to our response in A.1 for increasing institutional level volume discounts available.

3. List any platform fees for accessing purchased titles.

GOBI Library Solutions does not set hosting or platform fees. Any fees are billed directly by the ebook publisher or aggregator themselves.

4. Provide information on any added fees for supplying MARC records or other metadata records.

GOBI Library Solutions provides MARC records at varying price ranges depending upon the level of services selected. Please refer to *Exhibit #11, GOBI Library Solutions' Technical Services Price List* for the full range of prices and services.

5. Outline pricing model(s) for any DDA or PDA program such as short term loans, simultaneous users, etc.

GOBI Library Solutions is pleased to be able to waive the DDA annual subscription fee for all Universities accessing this contract throughout its term.

Short Term Loan options on the EBSCOhost and ProQuest platforms include:

- 1 day
- 7 days
- 14 days
- 28 days

The library chooses the length of the Short-Term Loan and determines how many Short-Term Loans are allowed before triggering a purchase. The most common set-up is to allow one Short-Term Loan with the second access triggering a purchase. Many libraries also choose to purchase on the first use and are granted perpetual access to that title

On both hosting platforms, a user can access a title for a "free browse" period. A Short-Term Loan or Purchase (depending on the library's settings) will occur when the user:

- Uses the book longer than  $n$  minutes
- Prints portions of the book
- Copy/Paste portions of the book
- Downloads the book

Mediation of GOBI PDA Short Term Loans (ie rental upon library approval) is available for titles elected on the ProQuest platform.

6. Outline pricing for service options for alumni access to content.

GOBI Library Solutions provides access for content through our aggregators and direct from a growing number of publishers. Each of these parties has license limits on such factors as simultaneous users, interlibrary loan, course management systems, and reserves and strategies for perpetual access and preservation. While we have worked successfully with all of these parties to ensure the best possible terms for our current customers, the ultimate access options are maintained by our publisher/aggregator partners.

C. Describe offered discounts or pricing benefits based on the combined annual spend of the VASCUPP schools.

Please refer to the pricing offered in paragraph A.1. that outlines a scaled discount based on the combined annual expenditure of VASCUPP schools.

D. Describe other services/resources being offered and specify associated cost.

BookZone-This service allows libraries to locate and acquire their own copies of out-of-print and out-of-stock books in very good, like new or excellent condition directly through our online database GOBI. BookZone titles are sold at list price less a 5% discount and plus a 15% service fee.

Please refer to [Exhibit #11](#) for additional services/resources and their associated costs.

E. Provide all costs associated with training.

GOBI Library Solutions will provide all training, customer support, and documentation for user support and system administration at no cost to members, or those institutions riding the contract, for the duration of the contract.

F. List any additional costs or fee-based services associated with print or electronic monographs such as license management, database surcharges, custom reports, enhancements, etc.

GOBI core services shall be provided at no cost to all Universities/institutions accessing this contract throughout its term. All other annual subscription fees for GOBI (with the exception of Reviews) shall be waived for VASCUPP member Universities for the initial three (3) years of the contract and shall be renegotiated at contract renewal.

GOBI Reviews are available for an annual subscription fee of \$570.00 per individual institution.

G. Specify any associated cost that has not already been identified.

Please refer to [Exhibit #11](#) for all additional fees/costs not already identified above.

H. Specify any additional discounts available for early payment of invoices (e.g., 1% Net 15/30).

GOBI Library Solutions does not apply additional discounts for early payment of invoices.



- I. Specify any associated charge card processing fees, if applicable, to be billed to the university. Vendors shall provide their VISA registration number when indicating charge card processing fees. Any vendor requiring information on VISA registration may refer to <https://usa.visa.com/support/small-business/regulations-fees.html> and for questions <https://usa.visa.com/dam/VCOM/global/support-legal/documents/merchant-surcharging-qa-for-web.pdf>.

GOBI Library Solutions accepts the following methods of payment for the services offered under this contract: check, electronic funds transfer (EFT), or by debit from a deposit account. Any other method of payment will be subject to approval by both parties. Terms are net 30 days from the date of the invoice to qualified buyers.

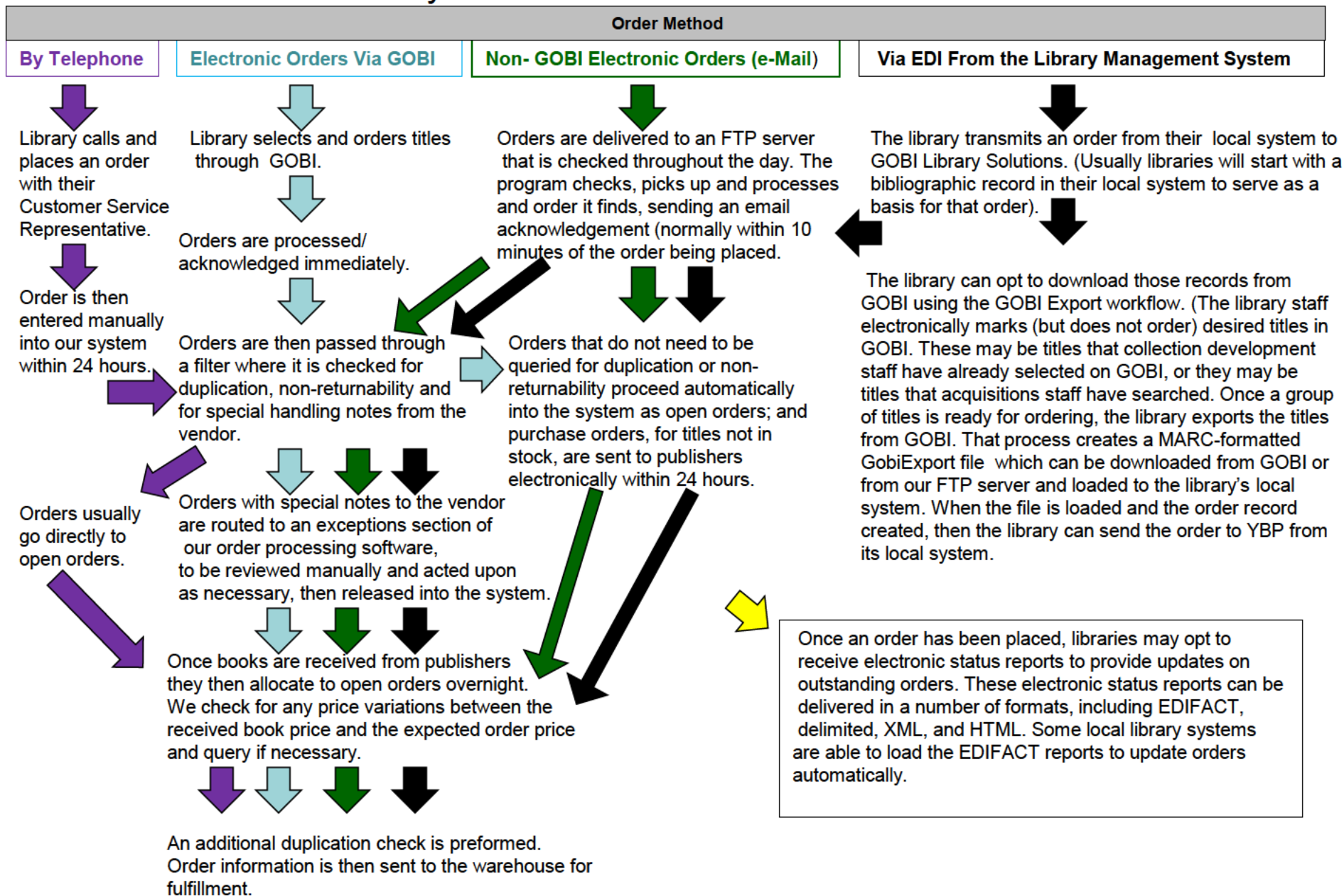
# eSupplier Platforms Available in GOBI®

Through partnerships with publishers and content aggregators, GOBI offers the most comprehensive digital discovery and fulfillment services in the industry.

eSupplier	Title by Title	eCollections	eSeries	Evidence-Based Acquisition	Users (1 User, 3 User, Unlimited User)
Al Manhal	x				1U, UU
Bloomsbury	x	x			UU
Brill	x				UU
Cambridge University Press Online	x	x	x		1U, UU
De Gruyter	x				UU
Digitalia Hispanica*	x				UU
Duke University Press		x			UU
EBSCO*	x				1U, 3U, UU, Concurrent Access
Edward Elgar		x			UU
Elsevier ScienceDirect	x		x		UU
GALE Virtual Reference Library (GVRL)	x				UU
IGI Global Online*	x	x			UU
JSTOR	x				UU
McGraw-Hill eBook Library		x			UU
Oxford University Press	x	x	x		1U, 3U, UU
Oxford Clinical Psychology Online	x				1U, 3U, UU
Oxford Handbooks Online		x			UU
Oxford Medicine Online	x				1U, 3U, UU
Oxford Reference Online	x				UU
Oxford Scholarly Editions Online		x			UU
Oxford UPSO (University Press Scholarship Online)	x	x			1U, 3U, UU
Project MUSE	x	x			UU
ProQuest Ebook Central (EBL, ebrary)	x				1U, 3U, UU, Non-Linear Lending
Rittenhouse R2 Digital Library*	x				1U
SAGE Knowledge	x	x	x		UU
SpringerLink		x			UU
Springer Reference	x				UU
Taylor & Francis eBooks*	x	x	x	x	UU
Wiley Online Library	x	x	x	x	UU
World Scientific	x	x			UU

\*E-Books in Minutes

# GOBI Library Solutions Order Workflow for Print Material



# Order Workflow for Print Material, page 2

## Fulfillment Workflow



**An order list or “pick-list” is created for each order using a specific ID number.**



Titles are picked from locations in the warehouse that are indicated on the pick-list. If a carton/cart becomes full, it is sent down the line to Quality Control and is replaced with a new cart. This process repeats until each title on the list has been picked.



Quality Control scans each title to record what is on each cart, and to make sure that the books selected match what had been ordered. Any titles that seem incorrect are moved to a problem cart, and are noted in the system (wrong binding, damaged, etc..) as well as any title missing from the pick location. Books are arranged by the order on the pick-list and set aside for physical processing or shipping.



**Books that are marked to be processed will follow an efficient route of cataloging and physical processing.**



Book processing technicians will follow detailed Instructions, developed through collaboration with the library, in order to process the books on each pick-list according to the library's specifications. For example: barcodes will be applied, Mylar covers put on jackets, spine labels created and applied. This process can add anywhere from one to five work days to the supply time.



Once the entire pick-list/order has been processed the books will be reviewed by Quality Control one more time and will then be released to shipping.



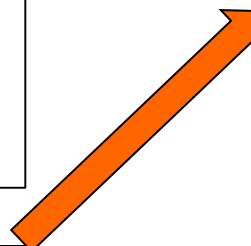
**Books not receiving processing or cataloging will be checked over one more time by Quality Control and are sent to shipping.**



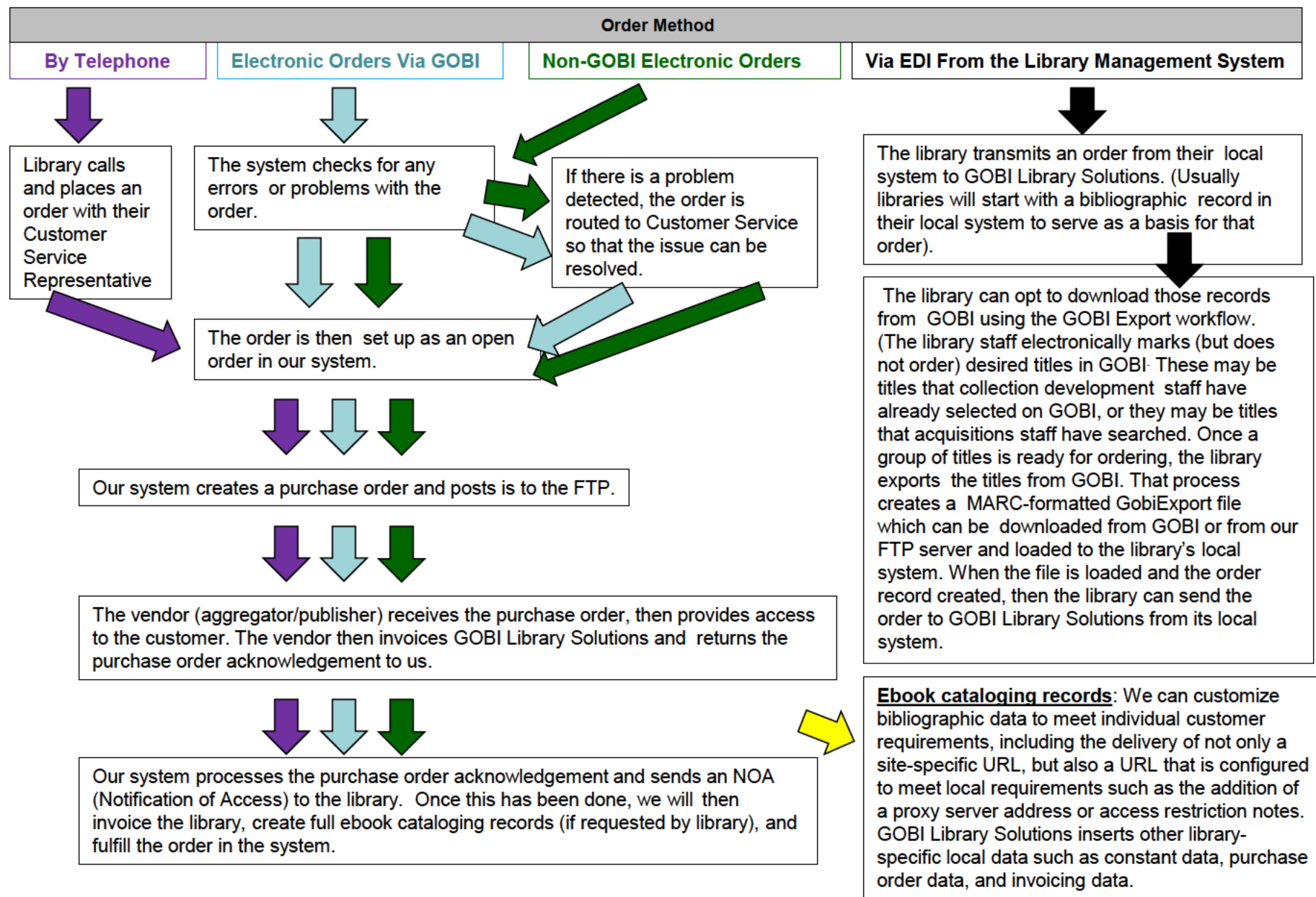
Books are checked over once more and are then are packaged/ invoiced to be shipped on each sub-account's assigned shipping day.



Delivery to the library after shipment is by common carrier.



# eBook Firm Order Workflow



## Reports available on GOBI

- 1) **Library Activity Report:** Allows the library to easily build a report and find title level information on open orders, invoiced, cancelled or returned items. This report allows the customer to also find the aforementioned information by filtering on fund codes, invoice numbers, dates and return reasons. Below is a screenshot of the report set-up screen and the results screen. From here, libraries can check invoice numbers, access invoices in PDF, export a list of titles in an excel or PDF format, send the selected bib record to an email address or send a query to Customer Services directly from GOBI.



- 2) **Open Order Report:** it can be run as a summary (see below) or can be split into sub-accounts, fund codes, publisher, etc.

GOBI®					DESVBP (1120)   Contact   Help   Site Map   Log Out				
Keyword					Approval Bookshelf   Select Cart   Order Cart				
Spotlight Lists   Search   Notifications   Folders   Reports   Options   Library   Links									
Open Order by: Subaccount									
Go Back   Email   Save To Disk   Print   Save Parameters									
Subaccount	Qty on Order	Qty Not Yet Published	Qty Allocated	Total Est Net Cost					
1120-06US9600012107	100	5	38	\$ 5,162.94					
1120-09US8600015232	34	0	9	\$ 1,802.88					
1120-12US9600012107	10	0	0	\$ 161.81					
1120-26US9600012106	2	0	2	\$ .00					
1120-55US9600012106	17	0	0	\$ .00					
Grand Totals	163	5	49	\$ 7,127.63					

- 3) **Expenditure report:** It can be run as a summary or be split by LC classification, Fund or publisher. This report displays the net expenditure in a given period. The example below shows an Expenditure report split by Fund.

GOBI®					HINEL (30500)   Contact   Help   Site Map   Log Out				
Keyword					Export Cart   Select Cart   Order Cart				
Spotlight Lists   Search   Notifications   Folders   Reports   Options   Library   Links									
Expenditure Report by: Fund									
Go Back   Email   Save To Disk   Print   View Parameters									
Fund	Shipped/Invoiced	Credited	Acquired	Net Expenditure					
BUS ETHICS	0	0	0	\$ .00					
ECONOMICS	0	0	0	\$ .00					
LAWIB	0	0	0	\$ .00					
MASERI	0	0	0	\$ .00					
ME44	0	0	0	\$ .00					
MISEF	1	0	1	\$ 34.32					
MO41	6	0	6	\$ 310.58					
MOSC	19	0	19	\$ 1,158.62					
MSELDA	0	0	0	\$ .00					
MU45	46	0	46	\$ 2,507.15					
Grand Total	72	0	72	\$ 4,010.67					

- 4) **Library Approval Activity:** tracks activity in a library's approval plan to include titles profiled, ordered, slips sent, etc.

App Activity Report Library Approval Activity grouped by Summary															
Activity on titles profiled within date range 03/04/2016 - 03/04/2017															
Summary	Print			Electronic				Slips				Approval Universe			
	Profiled	Shipped	Returned	Profiled	Invoiced	Moved to DDA	Rejected & On Hold	Print Sent	Print Ordered	Electronic Sent	Electronic Ordered	Print Profiled	Print Acquired	Print Coverage	Electronic Profiled
Grand Total 04/03/2016 - 04/03/2017	63,904	1	0	42,737	0	0	0	13,454	18	0	0	63,904	0.0%	21.1%	42,737

- 5) **Approval Expenditure:** Tracks expenditure across a library's approval plan (both book and slip) in a selected period of time. The report can be displayed to show a summary or



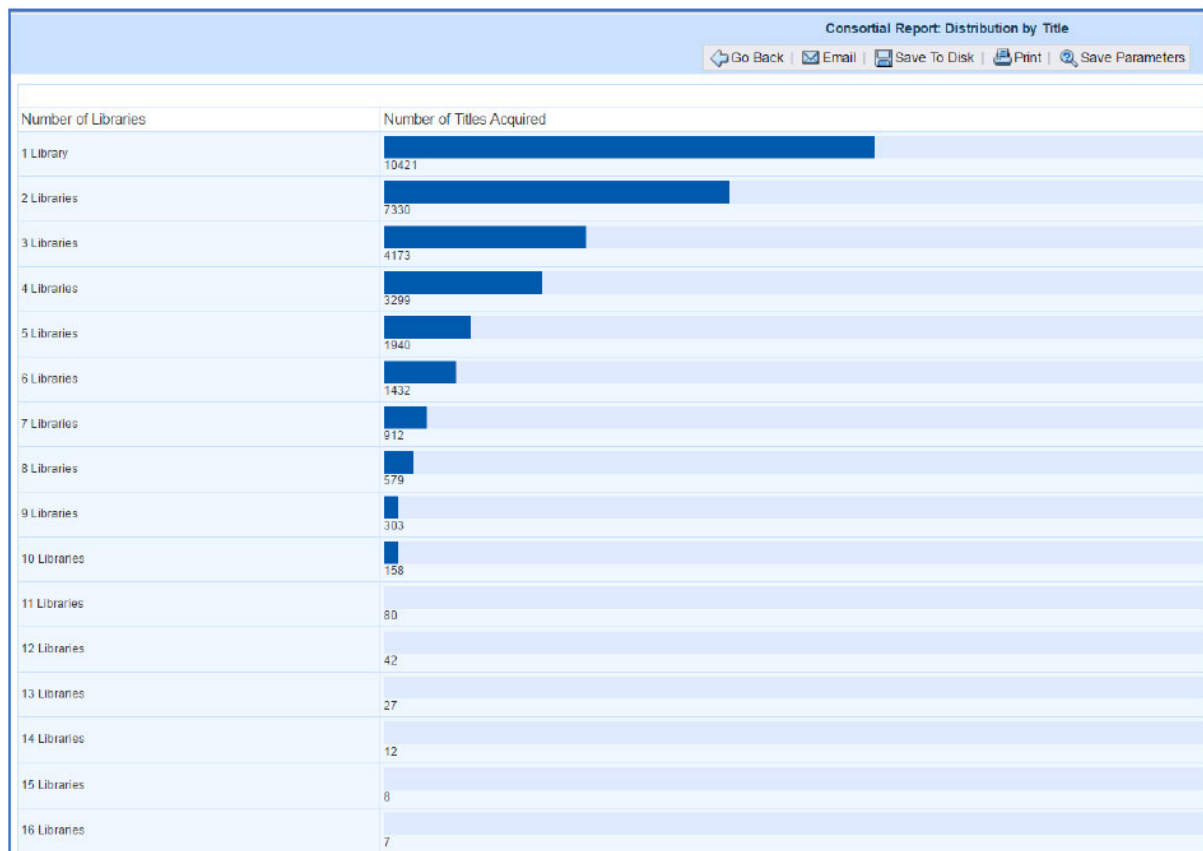
expenditure by: publisher, series, fund code, LC Class. The example below is a summary for a customer that has a book approval plan.

Library Approval Expenditure grouped by Summary										
<a href="#">Go Back</a>   <a href="#">Email</a>   <a href="#">Save To Disk</a>   <a href="#">Print</a>   <a href="#">Save Parameters</a>										
<b>App Exp UK Library Approval Expenditure grouped by Summary</b>										
Activity on titles profiled within date range 4/3/2016 - 4/3/2017										
Summary	Print		Electronic	Print Slips		Electronic Slips		Print Net		
	Shipped	Returned	Invoiced	Sent	Ordered	Sent	Ordered	Acquired	Cost GBP	Average Cost GBP
Grand Total 04/03/2016 - 04/03/2017	222	0	0	4,685	0	0	0	222	£10,726	£48.32
<b>Total</b>	<b>222</b>	<b>0</b>	<b>0</b>	<b>4,685</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>222</b>	<b>£10,726</b>	<b>£48.32</b>

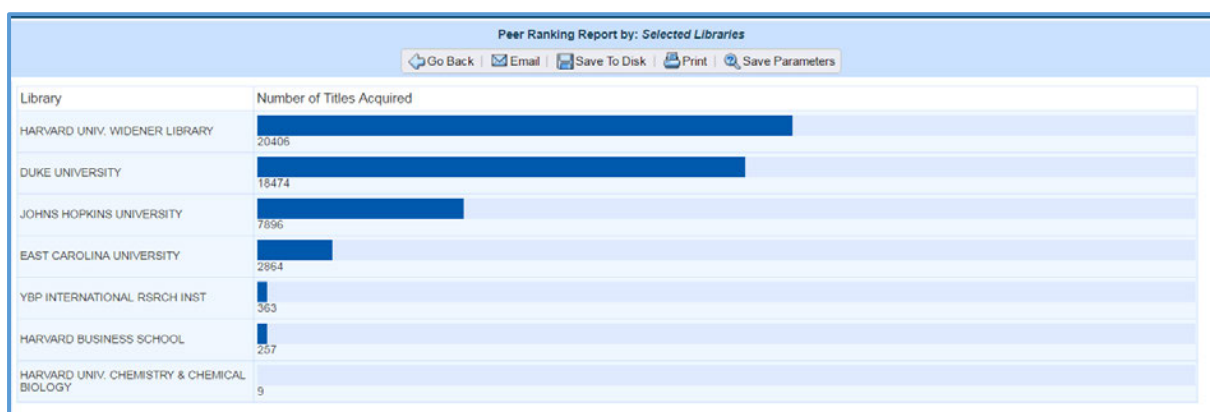
- 6) **Standing Orders/Continuations Report:** displays the total number of volumes per Series received as well as the list price, discount and net price.


Continuations Shipment Report						
<a href="#">Go Back</a>   <a href="#">Email</a>   <a href="#">Save To Disk</a>   <a href="#">Print</a>   <a href="#">View Parameters</a>						
Series	PO #	Fund	Vols	List Price	Discount	Net Price
CAMBRIDGE EDITION OF THE WORKS OF IMMANUEL KANT.	1047929		1	£84.99	5 %	£80.74
CAMBRIDGE HISTORY OF CHINA.	1050837		1	£120.00	5 %	£114.00
COLLECTED WORKS OF JEREMY BENTHAM.	1009503		2	£170.00	5 %	£161.50
CORRESPONDENCE OF CHARLES DARWIN.	1004116		1	£94.99	5 %	£90.24
DOCUMENTS ON IRISH FOREIGN POLICY.	1271659		1	£45.00	5 %	£42.75
QUANTITATIVE APPLICATIONS IN THE SOCIAL SCIENCES.	1650415		1	£15.99	5 %	£15.19
Grand Total:			7	£530.97		£504.42

- 7) **Consortial Reports:** allows a member library to search for the number of titles acquired by a consortium of which they are a member. This report can also provide detail on the number of titles acquired or not acquired with an option to exclude titles acquired by the library running the report.



- 8) **Peer Ranking Report:** displays the number of titles acquired by peer libraries as selected by the GOBI user.



	A	B	C	D	E
1	 <b>Transition Timeline for VASCUPP</b>				
2	<b>Date/Deadline</b>	<b>Task</b>	<b>Person(s) responsible</b>	<b>Current status/next step</b>	
3					
4					
5	<b>First month</b>				
6	Within 2-3 days of GOBI being awarded the business	Send JMU/VASCUPP the Transition Timeline. Set up basic account structure (print, eBook, rush orders, etc.) and all GOBI database logins for Users	Alyse Camus and Customer Service Representative		
7	Before the first face-to-face meeting, start this dialogue	Conference call with Tech services (agenda: get started on all tech services needed; get location and funds list to GOBI; discuss holdings load for deduplication)	Alyse Camus, Moriah Guy and Ashley Fast		
8	As soon as account structure is in place (see row 6 above), schedule this call	Discuss basic set ups with Customer Service and how the library would like their invoice settings (shipment date, sort order, etc.); firm order set up; eBook account set up; and make sure all accounts are set up for ordering so that any firm ordering can start as soon as technical services are implemented	Alyse Camus and Customer Service Representative		
9	Immediately following the set up of the account structure	Establish criteria for deciding which open orders to leave open for delivery from previous vendor and which open orders to cancel and re-order in GOBI.	Alyse Camus and Customer Service Representative		
10	Face-to-face visit within a couple of weeks of proposal acceptance	Introduction meeting with the GOBI Library Solutions Project Team (agenda: set up time to do profiling, discuss overall structure, etc.; GOBI Administrator and Acquisitions Training; meet with Technical Services to wrap up anything outstanding to get those implemented ASAP)	Alyse Camus, Moriah Guy and Ashley Fast		
11	Within a day or two of the initial in-person meeting	Send profiling schedule (template to schedule profiling session for when the time comes); documentation on how we write approval profiles; anything that Collection Development and Librarians need to have on hand for the profiling session	Alyse Camus and Ashley Fast		
12	<b>Second Month</b>				
13	Whenever VASCUPP member Library would like to schedule this	Overview of GOBI and approval workshop for all Selectors; Profiling writing session (est. 3 days)	Alyse Camus and Ashley Fast		
14	Within 2 weeks of profiling	Provide a title list and cost estimate of how the profile will run once it starts; make any last minute tweaks (if necessary) before it starts	Alyse Camus and Ashley Fast		
15	3-4 Weeks after Profiling Session complete	Approval Profile up and running. First set of notification slips should arrive within 3-4 weeks and the first batch of books shortly after	Alyse Camus and Ashley Fast		
16	<b>Third Month</b>				
17	Whenever VASCUPP member library would like to schedule this	Any follow up training (as needed either via Webinar or in person Training)	Alyse Camus		
18		Discuss and evaluate if a retrospective report is needed to catch any titles missed during the transition period	Alyse Camus and Ashley Fast		
19		Check in on profile at 30 day mark to make sure running as expected; return again at the 6 month mark for in-person adjustments	Alyse Camus and Ashley Fast		

	A	B	C	D	E
1		Transition Timeline			
2	<b>Project Team:</b>				
3	<b>Name</b>	<b>Title</b>	<b>Contact Number</b>	<b>Contact eMail</b>	<b>Allocated Hours</b>
4	Alyse Camus	Collection Development Manager	(919) 370-6986	<a href="mailto:acamus@ebSCO.com">acamus@ebSCO.com</a>	The project team will work together on an as needed basis to support the needs of each VASCUPP member. As a general approximation, the transition of a new member will be supported with an initial 200 hours from the combined project team. Additional support hours are available on an ad hoc basis.
5	Ashley Fast	Director, Collection Development & Workflow Solutions	(603) 545-7514	<a href="mailto:abailey@ybp.com">abailey@ybp.com</a>	
6	Krystal Katsouleris	Customer Service Representative	(603) 746-8881	<a href="mailto:kkatsouleris@ybp.vcom">kkatsouleris@ybp.vcom</a>	
7	Moriah Guy	New Business Development Manager	(760) 201-6606	<a href="mailto:moriahguy@ebSCO.com">moriahguy@ebSCO.com</a>	

12/19/2019

PACKING LIST: 00000XXXXXX

Page: 1

From:  
YBP Library Services, Inc.  
999 Maple Street  
Contoocook, NH 03229

To: XXXX-XX  
XXXXXXXXXXXXXXXXXX  
ACQUISITIONS SECTION  
XXXXXXX LIBRARY  
City, State  
Country,

Quantity	Title	ISBN
1	ARCHITECTURE OF NOTHINGNESS: AN EXPLANATION OF	1138214124
1	DESIGN OF EMBEDDED ROBUST CONTROL SYSTEMS USING	1785613308
1	DIGITAL ATLAS OF TRADITIONAL FOOD MADE FROM	9492444704
1	FUNDAMENTALS OF MARINE RISER MECHANICS: BASIC	1593704062
1	GREEN EVENTS AND GREEN TOURISM: AN INTERNATIONAL	1138334758
1	JAY: EUROPEAN CONNECTIONS OF A BRONZE AGE SCHOLAR.	9492444577
1	MODERNIZATION AND REVOLUTION IN CHINA.	1138647047
1	ORLANDO: PHOTOGRAPHY; ED. BY ROD HAMILTON.	3775744436
1	REMEMBERING WOMEN'S ACTIVISM.	1138794880
1	ROMANCING THE SPERM: SHIFTING BIOPOLITICS AND THE	0813590795
1	THOMAS O'BRIEN: LIBRARY HOUSE.	1419732617
1	TOWARD A LINGUISTIC AND LITERARY REVISION OF	1527515893
1	UNTRUE: WHY NEARLY EVERYTHING WE BELIEVE ABOUT	0316463612
1	WIRELESS POWER TRANSFER: THEORY, TECHNOLOGY, AND	1785613464
1	WORKING LIVES: ESSAYS IN CANADIAN WORKING-CLASS	1487503253
1	8-BIT APOCALYPSE: THE UNTOLD STORY OF ATARI'S	1468316443

Total quantity enclosed: 16



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This is a packing list, not an invoice. The invoice is in the box labeled "invoice enclosed". Please contact your YBP Customer Service Representative or Bibliographer if the invoice has not been received within 4 days.

**Contoocook, NH 03229**

A service of YBP, Inc.

PO Box 277991 Atlanta, GA 30384-7991 USA

303477

PAGE 1

TO:

TO:

9	* Service fee added, short or no discount	Original	93-53			Sub Total	471.98
TOTOTY	from publisher	Freight Surchage	1.18	GST/Tax	.00	Total US\$	473.16

## RETURN BOOKS ONLY TO:

YBP Library Services

999 Maple St.

Contoocook, NH 03229

**GOBI** Library Solutions from EBSCO

A service of YBP, Inc

Remit to: PO Box 277991 Atlanta, GA 30384-7991 USA

PHONE: AR: 855-876-3799 (toll-free) Customer Service: 603 746-3102 800 258-3774  
1% Finance Charge per 30 days past duePlease refer to invoice number  
below when writing or remitting.**INVOICE  
NUMBER****356211**

PAGE 1

SOLD

TO:

SHIP

TO:

INVOICE DATE	TERMS	DUE DATE				CUSTOMER ORDER NUMBER		CUSTOMER NUMBER	
2/07/20	net 30	3/08/20				EBOOK ORDERS			
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UU	BOOK IN MOVEMENT: AUTONOMOUS POLITICS & THE					NON-RETURNABLE			
1	17399	WHITENER, 082298685X			HG	67.50	.0%	67.50	67.50
UU	CRISIS CULTURES: THE RISE OF FINANCE IN MEXICO					NON-RETURNABLE			
1	17401	BEVERLEY, 0822986906			JV	55.43	.0%	55.43	55.43
UU	FAILURE OF LATIN AMERICA: POSTCOLONIALISM IN B					NON-RETURNABLE			
1	17402		1509527370		DS	47.16	.0%	47.16	47.16
UU	ISRAEL/PALESTINE READER; ED. BY ALAN DOWTY.					NON-RETURNABLE			
1	17404	CALVI, PA	082298671X		PN	67.50	.0%	67.50	67.50
UU	LATIN AMERICAN ADVENTURES IN LITERARY JOURNALI					NON-RETURNABLE			
1	17407	SCHIWY, F	0822986671		HM	60.00	.0%	60.00	60.00
UU	OPEN INVITATION: ACTIVIST VIDEO, MEXICO, AND T					NON-RETURNABLE			
1	17409		1477317325		HV	45.00	.0%	45.00	45.00
1U	POLITICS AFTER VIOLENCE: LEGACIES OF THE SHINI					NON-RETURNABLE			
1	17410	GERAGHTY, 082298637X			PQ	44.93	.0%	44.93	44.93
UU	POLYPHONIC MACHINE: CAPITALISM, POLITICIAL					NON-RETURNABLE			
1	17412	POLIT DUE	0822987139		PN	60.00	.0%	60.00	60.00
UU	UNWANTED WITNESSES: JOURNALISM & CONFLICT IN					NON-RETURNABLE			

9	* Service fee added, short or no discount	Original	495-07		Sub Total	515.02
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Exhibit #8 Sample MARC Record

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=245 10\$aConstitutional law /\$cSteven L. Emanuel.  
=250 \\\$aThirty-third edition.  
=264 \1\$aNew York :\$bWalters Kluwer,\$c2016.  
=300 \\\$axxx, C-114, 792 pages ;\$c28 cm.  
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=338 \\\$avolume\$bnc\$2rdacarrier  
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=500 \\\$aIncludes index.  
=505 0\\\$aIntroduction -- The Supreme Court's authority -- Federalism and federal power generally -- The federal commerce power -- Other national powers -- Two limits on state power: the dormant commerce clause and congressional action -- Intergovernmental immunities and interstate relations -- Separation of powers -- Due process of law -- Equal protection -- Miscellaneous clauses: 14th am. privileges or immunities; taking; contract; right to bear arms; ex post facto; bills of attainder -- State action -- Congressional enforcement of civil rights -- Freedom of expression -- Freedom of religion -- Justiciability -  
- Essay exam questions and answers -- Table of cases -- Subject matter index.  
=650 0\\\$aConstitutional law\$zUnited States\$vOutlines, syllabi, etc.  
=650 0\\\$aConstitutional law\$zUnited States\$xExaminations\$vStudy guides.  
=830 0\\\$aEmanuel law outlines.

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=050 \4\$aQC176.8.N35\$bC58 2017  
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=264 \1\$aCham, Switzerland :\$bSpringer,\$c[2017]  
=300 \\\$axii, 363 pages:\$billustrations ;\$c24 cm  
=336 \\\$atext\$btxt\$2rdacontent

# Exhibit #8 Sample MARC Record

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 =338 \\\\$avolume\$bnc\$2rdacarrier  
 =490 1\\\$aChallenges and advances in computational chemistry and physics ;\$vvolume 23  
 =504 \\\\$aincludes bibliographical references and index.  
 =505 0\\\$aGlobal optimisation strategies for nanoalloys -- Structural Identification of doped silicon clusters -- Structural evolution, vibrational signatures, and energetics of niobium clusters from Nb<sub>2</sub> to Nb<sub>20</sub> -- Submersion kinetics of ionized impurities into helium droplets by ring-polymer molecular dynamics simulations -- Structure, stability, and electron counting rules in transition metal encapsulated silicon and germanium clusters --Transition metal doped boron clusters : structure and bonding of BnM<sub>2</sub> cycles and tubes -- Silicate nanoclusters : understanding their cosmic relevance from bottom-up modelling --Magnetic anisotropy energy of transition metal alloy clusters --Growth pattern and size-dependent properties of lead chalcogenide nanoclusters --Chemical reactivity and catalytic properties of binary gold clusters : atom by atom tuning in a gas phase approach -- Index.  
 =520 \\\\$aThe field of atomic clusters continues to attract great interest among physicists and chemists alike. This is in part due to their intrinsic properties and potential industrial applications. The first part of Clusters is devoted to recent developments in experimental techniques, the second part covers a variety of theoretical approaches. Different theoretical methods based on group/graph theories and quantum chemical computational methods as well as various spectroscopy techniques (such as mass, laser, infrared, photoelectron etc.) are applied to the determination of the existence of geometrical and electronic structures, chemical bonding phenomena, and the thermodynamic stabilities of several classes of binary clusters. All chapters within this review volume have been contributed by experts in chemistry, physics, and material sciences based at the University of Leuven, Belgium. This book is aimed at professionals and students working in cluster science.  
 =650 \0\\\$aMicroclusters.  
 =650 \0\\\$aNanochemistry.  
 =700 1\\\$aNgyuen, Minh Tho,\$\$editor.  
 =700 1\\\$aKiran, Boggavarapu,\$\$editor.  
 =830 \0\\\$aChallenges and advances in computational chemistry and physics ;\$v23.

=LDR 02904cam 2200457li 4500  
 =001 co31048043  
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 =008 170109s2017\\\\\\nyua\\\\\\ob\\\\\\001\\0\\eng\\d  
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 =020 \\\\$a9780316388405\$q(electronic bk.)  
 =020 \\\\$a0316388408\$q(electronic bk.)  
 =020 \\\\$a9780316388382\$q(electronic bk.)  
 =020 \\\\$a0316388386\$q(electronic bk.)  
 =020 \\\\$z0316388394\$q(hardcover)  
 =020 \\\\$z9780316388399\$q(hardcover)  
 =043 \\\\$an-us---  
 =050 \4\\\$aHD62.5\$b.S76 2017  
 =082 04\\\$a338.04/09273\$223  
 =100 1\\\$aStone, Brad,\$\$author.

Exhibit #8 Sample MARC Record

=245 14\$aThe upstarts :\$bhow Uber, Airbnb, and the killer companies of the new Silicon Valley are changing the world /\$cBrad Stone.

=250 \1\$aFirst edition.

=264 \1\$aNew York :\$bLittle, Brown and Company,\$c2017.

=300 \1\$a1 online resource (x, 372 pages, 16 unnumbered pages of plates) :\$billustrations

=336 \1\$a\$text\$btxt\$2rdacontent

=337 \1\$a\$acomputer\$bcr\$2rdamedia

=338 \1\$aonline resource\$bcr\$2rdacarrier

=504 \1\$aIncludes bibliographical references and index.

=520 \1\$aNew York Times In 2007, the crash had Wall Street and Silicon Valley reeling. The original renegades like Steve Jobs were now the establishment, and tech had become a way of life for suburban moms as much as for visionaries. The Valley was ready for a new revolution. Enter THE UPSTARTS. Genius entrepreneurs with no lack of self-confidence created companies that turned our expectations on their heads. Travis Kalanick of Uber and Brian Chesky of Airbnb are just two of the disrupters Brad Stone examines in this fly-on-the-wall look at the intersection of tech, business, and culture. With unprecedented access to all the key players, Stone illuminates the smart, driven, and often comically flawed people who are upending industries and changing the way we all live and work. The world today is vastly different than it was even ten years ago, and it is due to the upstarts. In THE UPSTARTS, Brad Stone provides the rollicking narrative that shows the how our latest--and perhaps greatest--technological wave was born.

=588 \1\$aDescription based on online resource; title from digital title page (viewed on May 19, 2017).

=610 20\$aAirbnb (Firm)

=610 20\$aUber (Firm)

=650 \0\$aNew business enterprises\$zUnited States\$vCase studies.

=650 \0\$aEntrepreneurship\$zUnited States\$vCase studies.

=650 \0\$aElectronic commerce\$zUnited States.

=650 \0\$aBed and breakfast accommodations\$zUnited States\$y21st century.

=650 \0\$aRidesharing\$zUnited States\$y21st century.

=655 \4\$aElectronic books.



HC  
110  
T4  
G36  
2019

**Exhibit #9 – Spine Labels**

RR Stack  
DA  
16.8  
.F85  
2020

RR Stack  
DA  
16.8  
.F85  
2020  
The warrior, the voyager  
and the artist  
DO NOT APPLY BOOK LABEL  
PL-42786

R  
154  
.P8675  
A3  
2019

R  
154  
.P8675  
A3  
2019  
That good night :  
Puri, Sunita, 1979-

PN  
6728  
.H367  
H3  
2019

PN  
6728  
.H367  
H3  
2019  
Harley Quinn and the  
birds of prey  
DO NOT APPLY BOOK  
PL-48251

LB1028  
.3  
.T34  
2020

LB1028  
.3  
.T34  
2020  
Technology  
segregation  
DO NOT APPLY BOC  
LABEL author.  
PL-45854  
311007

## Key Performance Indicators

GOBI Library Solutions is committed to ensuring that our customers receive the best service possible, and that standards agreed upon are continuously met over the life of the agreement. Our Customer Service department has well-established procedures ensuring that all Key Performance Indicators are met, and that correct escalation procedures are followed should any problems arise.

Key Service Performance Levels	Initial Response Time	Maximum Working Days to Completion	Comments
<b>General Customer Correspondence</b>			
Acknowledgement of query, and first action within:	24 – 48 hours	2	
Follow-up on queries, if not immediately resolved, within:	24 – 48 hours	5	Through to resolution
Address change acknowledged, and first action within:	24 hours	1	
Address change processed within:		2	
<b>eBook Access:</b>			
Response to eBook query not related to access	24 – 48 hours	2	Initial Response within 24 hours; Resolution within 48 hours
Response to eBook query related to access	24 – 48 hours	2	Initial Response within 24 hours; Resolution within 48 hours
Follow-up on queries, if not immediately resolved, within:		5	Through to resolution
Maintenance of electronic access:		Ongoing	
Notification of Access (NOA)	24 – 48 hours	1 - 2	Please note our eBook in Minutes allows for select titles to be available within minutes
<b>Orders:</b>			
Acknowledgement for order placed on GOBI		Immediate	
Acknowledgement for order placed via email, post, or phone	24 hours	1	
Order processed		1	
Invoice dispatched		Upon Shipment	
<b>Print Cancellations:</b>			
Cancellation processed within:	24 hours	1	Please note we do not routinely accept cancellation for ebooks due to fast access; however, we will attempt to cancel the title if notified immediately.
<b>Claims:</b>			
Claim acknowledged within:	24 hours	2	
Provide a response from publisher within:		5	'Resolution' may mean 'completed' in that the publisher has dispatched or agreed to dispatch the claimed issue(s), or has confirmed their inability to supply the missing issues.
<b>Quotations:</b>			
Title Quotes provided within:		2 - 5	Please note that the number of titles and information provided by the customer may impact response time.



Library Solutions from EBSCO

Tech Svcs Add'l Cataloging

Exhibit #11 - GOBI Library Solutions Technical Services Price List

## Pricing for Order Support Services for VASCUPP

REDACTED- Replaced by Technical Support Services Pricing located at the beginning of the contract document

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# Request for Proposal

## **RFP# LBS-1072**

**Monographic Services**

**January 30, 2020**





# ***REQUEST FOR PROPOSAL***

## ***RFP# LBS-1072***

**Issue Date:** January 30, 2020  
**Title:** Monographic Services  
**Issuing Agency:** Commonwealth of Virginia  
James Madison University  
Procurement Services MSC 5720  
752 Ott Street, Wine Price Building  
First Floor, Suite 1023  
Harrisonburg, VA 22807

**Period of Contract: From Date of Award Through One Year (Renewable)**

**Sealed Proposals Will Be Received Until 2:00 PM on March 4, 2020 for Furnishing The Services Described Herein.**

*SEALED PROPOSALS MAY BE MAILED, EXPRESS MAILED, OR HAND DELIVERED DIRECTLY TO THE ISSUING AGENCY SHOWN ABOVE.*

All Inquiries For Information And Clarification Should Be Directed To: LeeAnne Beatty Smith, Buyer Senior, Procurement Services, [smith2LB@jmu.edu](mailto:smith2LB@jmu.edu), 540-568-7523, not later than five business days before the proposal closing date.

**NOTE: THE SIGNED PROPOSAL AND ALL ATTACHMENTS SHALL BE RETURNED.**

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

Name and Address of Firm:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

By: \_\_\_\_\_  
*(Signature in Ink)*

Name: \_\_\_\_\_  
*(Please Print)*

Date: \_\_\_\_\_

Title: \_\_\_\_\_

Web Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Fax #: \_\_\_\_\_

ACKNOWLEDGE RECEIPT OF ADDENDUM: #1 \_\_\_\_\_ #2 \_\_\_\_\_ #3 \_\_\_\_\_ #4 \_\_\_\_\_ #5 \_\_\_\_\_ (please initial)

SMALL, WOMAN OR MINORITY OWNED BUSINESS:

☐ YES; ☐ NO; *IF YES* ⇒ ☐ SMALL; ☐ WOMAN; ☐ MINORITY ***IF MINORITY*** ☐ AA; ☐ HA; ☐ AsA; ☐ NW; ☐ Micro

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

# ***REQUEST FOR PROPOSAL***

*RFP # LBS-1072*

## ***TABLE OF CONTENTS***

I.	PURPOSE .....	Page	1 .....
II.	BACKGROUND .....	Pages	1-4 .....
III.	SMALL, WOMAN-OWNED, AND MINORITY PARTICIPATION .....	Page	4 .....
IV.	STATEMENT OF NEEDS .....	Pages	4-8 .....
V.	PROPOSAL PREPARATION AND SUBMISSION .....	Pages	8-11 .....
VI.	EVALUATION AND AWARD CRITERIA .....	Page	11 .....
VII.	GENERAL TERMS AND CONDITIONS .....	Pages	12-18 .....
VIII.	SPECIAL TERMS AND CONDITIONS .....	Pages	19-23 .....
IX.	METHOD OF PAYMENT .....	Page	23 .....
X.	PRICING SCHEDULE .....	Pages	23-25 .....
XI.	ATTACHMENTS .....	Page	25 .....
	A. Offeror Data Sheet		
	B. SWaM Utilization Plan		
	C. Sample of Standard Contract		
	D. Zone Map		

## I. PURPOSE

The purpose of this Request for Proposal (RFP) is to solicit sealed proposals from qualified sources to enter into a contract to provide Monographic Services as needed at any of the eleven (11) Commonwealth of Virginia institutions of higher education known as the Virginia Association of State and College University Purchasing Professionals (“VASCUPP”). Initial contract shall be for three (3) years with an option to renew for two (2) additional three-year periods.

## II. BACKGROUND

The Virginia Association of State College and University Purchasing Professionals (VASCUPP) is an association of eleven (11) public higher education member institutions. One initiative of VASCUPP is to identify cooperative procurement opportunities and through competitive negotiations subsequently establish contracts in accordance with the Code of Virginia and the Commonwealth of Virginia’s Purchasing Manual for Institutions of Higher Education and Their Vendors. All VASCUPP members enjoy the benefits derived from increased economies of scale, resulting in lower prices and reduced administrative cost and effort. More information can be found at <https://vascupp.org/index.php>. This solicitation is issued and will be negotiated on behalf of all VASCUPP member institutions. James Madison University is serving as the lead institution and signatory on this solicitation and any resulting award(s).

Current VASCUPP contracts for monographic services were awarded in 2014 and have a final expiration date of January 28, 2021. These contracts specify a discount structure that is determined annually by the previous year’s collective contract spend of VASCUPP schools and all other Virginia higher education institutions that use the contract cooperatively.

The approximate collective contract spend for the past four (4) calendar years is as follows:

	2016	2017	2018	2019
Approvals *	\$4,281,74	\$3,884,345	\$3,544,160	\$3,569,803
Standing Orders/ Continuations *	\$545,029	\$545,320	\$424,163	\$366,199
Firm Orders *	\$1,999,372	\$1,847,336	\$1,953,953	\$1,703,822
Other acquisition models of e-resources	\$871,819	\$723,467	\$514,994	\$546,621
Services (Shelf-Ready, Processing, Other)	\$372,115	\$301,051	\$267,666	\$296,507
<b>Total</b>	<b>\$8,069,075</b>	<b>\$7,301,519</b>	<b>\$6,704,936</b>	<b>\$6,482,952</b>

\*Spend includes print and eBook

The following paragraphs provide background information on individual VASCUPP institutions.

### **George Mason University**

George Mason University (GMU) is a public research university located in Northern Virginia. The University is a Carnegie Research 1 (R1) institution with an enrollment of over 38,000 students studying in over 200-degree programs. The University employs approximately 7,177 full-time and part-time faculty and staff. GMU Libraries has locations on the main Fairfax campus, as well as the Arlington and Prince William campuses. GMU Libraries currently uses Ex Libris Alma library service and Primo discovery layer. GMU Libraries purchases electronic and print monographs through firm orders, approval plans, and standing orders. GMU Libraries does not currently have a local DDA or EBA program in place.

### **James Madison University**

James Madison University (JMU) is a comprehensive university in Harrisonburg, Virginia, that is part of the statewide system of public higher education in the Commonwealth. The university offers programs on the bachelor's, master's and doctoral levels with its primary emphasis on the undergraduate student. JMU's current enrollment is approximately 22,000 full and part-time students. The University employs approximately 4,000 faculty and staff. Currently, JMU purchases electronic and print monographs through both firm order and approval plans and has a local Demand Driven Acquisition eBook program in place. JMU currently utilizes Sierra's Innovative Interfaces as its integrated library system but is migrating to Ex Libris' Alma in July 2020.

### **Longwood University**

Founded in 1839 and located in the historic two-college community of Farmville, Longwood is a public 4-year institution and part of the proud tradition of higher education in the Commonwealth of Virginia. Longwood has a strong liberal arts foundation offering more than 100 majors, minors, and concentrations in the arts and sciences, business, education, and nursing. Graduate programs include business, communication sciences and disorders, education, English, and sociology. Current enrollment is 5,864 students from 38 states and 20 foreign countries. Currently, Longwood purchases electronic and print monographs through firm orders. Longwood currently utilizes Innovative Interfaces' Sierra as its integrated library system.

### **Old Dominion University**

Old Dominion University (ODU) is a state-supported metropolitan public research institution located in Norfolk, Virginia. The University offers 156 degree programs. Of these, 91 are Bachelor programs, 41 are Master programs, 22 are Doctoral programs, and two are Educational Specialist degrees. Total enrollment is 24,176. Students attend both full and part time, on and off campus. The University employs approximately 901 faculty members, 546 administrators & professional faculty, 1,053 classified employees, and 562 part time employees. ODU has three approval plans: a combination print and electronic preferred book plan; a second for Art print titles; and a third for Music scores. ODU implemented a DDA eBook program in August 2012, and a print DDA program in October 2017.

### **Radford University**

Radford University (RU) is a comprehensive university and has campuses in Radford and Roanoke (Radford University Carilion), Virginia, that is part of the statewide system of public higher

education in the Commonwealth. The university offers programs on the bachelor's, master's and doctoral levels with its primary emphasis on the undergraduate student. RU's current enrollment is approximately 11,870 full and part-time students. The University employs approximately 1,420 full-time and part-time faculty and staff. Currently, RU purchases electronic and print monographs through both firm order and approval plans. RU has a Demand Driven Acquisition eBook program for all academic departments. RU uses OCLC's WorldShare Management Services (WMS) as its integrated library system.

### **University of Mary Washington**

The University of Mary Washington (UMW) is a coeducational, state-supported institution of the Commonwealth of Virginia enrolling approximately 5,000 undergraduate and graduate students and employing around 1,000 faculty and staff. The institution consists of three colleges, Arts and Sciences, Business, and Education and offers programs at the bachelor's and master's levels. UMW purchases print and electronic monographs through firm orders and an approval plan. UMW is currently piloting a demand-driven eBook acquisition program and plans to expand it in the near future. Since 2017, UMW has used Ex Libris' Alma as its integrated library system.

### **University of Virginia**

The University of Virginia (UVA) is a comprehensive university in Charlottesville, Virginia. The 25,000 plus students attending the University work within a true meritocracy and live by an Honor Code unique among American universities. Each student is exposed to the widest spectrum of disciplines – from arts and athletics to humanities and technology. Our students also enjoy a unique connection to the world beyond college through the University's outstanding professional training, exemplified by its nationally ranked schools of Law, Business, and Medicine. UVA currently has over 15,000 permanent University faculty and staff that are committed to serving both the local and national community. UVA also has approval plans for both print and electronic materials.

### **Virginia Commonwealth University**

Virginia Commonwealth University (VCU) enrolls 32,000 students and is classified by Carnegie as Research University (very high research activity). VCU offers 42 doctoral, 70 master's, 3 professional, and 68 baccalaureate degree programs. Sponsored research funding totals \$310 million. Libraries at VCU--the James Branch Cabell Library on the Monroe Park Campus and the Tompkins-McCaw Library for the Health Sciences on the MCV campus--employ 68 professionals and 85 support staff. Ex Libris Alma library services platform and Primo discovery service are utilized by the Libraries. The Libraries purchase monographs through several approval plans (general academic, health sciences, art exhibition catalogs, and foreign language plans), by firm order, evidence-based acquisition, and by standing order. Over the past few years, VCU Libraries has transitioned to DRM-free eBook as the preferred format for most subject areas. The Libraries remain committed to print collections in the arts and humanities.

### **Virginia Military Institute**

Virginia Military Institute (VMI) is an undergraduate liberal arts college with a strong STEM component in Lexington, Virginia, that is part of the statewide system of public higher education in the Commonwealth. VMI's current enrollment is approximately 1,700 full-time students. VMI purchases print monographs through firm orders. VMI purchases electronic monographs via firm orders, Demand/Patron-Driven Acquisition and Evidence-Based Acquisition eBook programs. Currently, VMI provides patron access to a large collection of electronic monographs through a subscription service.

## **Virginia Tech**

Virginia Polytechnic Institute and State University, or Virginia Tech (VT), is a comprehensive public land-grant university with the main campus located in Blacksburg, Virginia. VT has one of the largest numbers of degree offerings in Virginia, enrolling over 35,000 on- and off-campus students taught by some 2,000 full and part-time faculty. The primary portion of VT's approval plan is e-only; there are also small print approval plans targeted towards award-winning books and new works by Virginia Tech authors. In addition, VT maintains a DDA program covering works in Humanities & Social Sciences as well as those in the STEM-H disciplines.

## **William and Mary**

William & Mary (W&M) is a medium-sized doctoral institution and part of the Commonwealth of Virginia higher education system of colleges and universities. The university enrolls 8,773 students who are involved in undergraduate and graduate programs in the arts & sciences, as well as programs at our four graduate/professional schools: Business, Education, Law, and the Virginia Institute of Marine Science. There are 2,790 full and part-time faculty and staff to support the curricular mission of the university. William & Mary Libraries use Ex Libris Alma & Primo as their library services platform and discovery layer. Currently, the libraries have a general academic print approval plan and a few smaller plans focusing on W&M authors, award-winners, and titles from select review sources. DDA and EBA plans are utilized by the libraries to acquire eBooks from a variety of suppliers. Monographs are also acquired via standing orders and through firm and rush orders upon request by faculty, librarians, and students.

### **III. SMALL, WOMAN-OWNED AND MINORITY PARTICIPATION**

It is the policy of the Commonwealth of Virginia to contribute to the establishment, preservation, and strengthening of small businesses and businesses owned by women and minorities, and to encourage their participation in State procurement activities. The Commonwealth encourages contractors to provide for the participation of small businesses and businesses owned by women and minorities through partnerships, joint ventures, subcontracts, and other contractual opportunities. Attachment B contains information on reporting spend data with subcontractors.

### **IV. STATEMENT OF NEEDS**

VASCUPP seeks a Contractor to provide print and electronic monographic services. Offerors shall describe in detail their approach to each of the following items:

#### **A. Scope of Service-** Describe the services being offered, including but not limited to:

1. Firm orders on a one-time basis
2. Approval orders according to profiles established by each institution
3. Standing orders
  - a. Numbered monographic series
  - b. Unnumbered monographic series
  - c. Volume sets issued over a period of time

4. Rush orders
5. Demand-Driven or Patron-Driven
6. Evidence-based Acquisition
7. Other

**B. Materials Covered-** Describe the materials being offered, including but not limited to:

1. Format
  - a. Print
    - i. Cloth
    - ii. Paper
  - b. Electronic
    - i. Single user
    - ii. Multiple users
    - iii. Licensing
    - iv. Notification of access
  - c. Media
    - i. DVD
    - ii. CD
    - iii. Streaming
      - a) Local
      - b) Hosted
2. Subject coverage
3. Geographic area
4. Language
5. Publisher type
6. Describe any barriers to providing access to eBook content or metadata from competitive publishers.



### **C. Ordering**

1. Describe all possible methods and workflows available for selection and ordering of materials, i.e., through vendor system, upload or Edifact transfer of orders from library system, API integration with library services platform, etc.

### **D. Fulfillment and Delivery-** Describe possible mechanisms and workflows available for fulfillment of orders and delivery of materials, including:

1. Fulfillment Rates
  - a. Percentage of orders filled
  - b. Average delivery time
2. Shipping method
3. Packaging
  - a. Packaging method and materials
  - b. Ability to limit weight and size of boxes
  - c. Packing slips
4. Ability to tailor shipments to individual institution needs
5. Ability to check library holdings for duplicate orders.

### **E. Claims & Cancellations**

1. Describe all possible methods and workflows available for claiming of materials (through vendor system, via email, vendor-initiated, etc.). Include proposed timelines for claim notifications and cancellations, both vendor and library initiated.

### **F. Returns**

1. Detail the contractor's return policy.

### **G. Invoicing & Payment-** Describe the services being offered, including but not limited to:

1. Invoice Delivery Methods
2. Payment Methods
3. Ability to tailor invoices to individual institution needs

### **H. Additional Services-** Describe the services being offered, including but not limited to:

1. Cataloging
2. Shelf-ready

3. Other

**I. Customer Service**

1. Describe the availability and experience of staff designated to respond to customer service inquiries. Include average timelines and mechanisms for responding to inquiries.
2. Describe mechanism for escalating issues.

**J. Vendor Catalog and Order System-** Describe the services being offered, including but not limited to:

1. System Functionality
  - a. Searching
  - b. Requests
    - i. Selectors/liaison librarians
    - ii. Academic faculty
      - a) Order Placement
      - b) Methods for authenticating users (i.e., user name/password, LDAP, Shibboleth)
2. Ability to interface with third-party library systems
3. Customization
  - a. For administrators
  - b. For selectors
4. Collection development tools
5. Reporting

**K. Set up and implementation-** Describe the proposed implementation plan, including but not limited to:

1. Typical implementation timeline and proposed project plan
2. Institutional level staff roles necessary for implementation
3. Approximate number of staff hours, broken down by staff role, necessary for implementation
4. Contractor support during the implementation process
5. Best practice recommendations for implementations

## **L. Training and Documentation**

1. Describe available documentation for user support and system administration and provide copies for review if requested. Description of documentation should include type of documentation (e.g., HTML, PDF, or Excel documents) and whether freely available to all users or restricted to local library administrators.
2. Describe on-site training sessions taught by contractor personnel available to librarians and other staff at each VASCUPP institution (specify any associated charges in Section X. Pricing Schedule).
3. Describe online training sessions taught by contractor personnel available to librarians and other staff at VASCUPP institutions (specify any associated charges in Section X. Pricing Schedule).

## **M. Trial and Samples**

1. The Contractor shall provide VASCUPP members trial access to applicable systems.
2. The Contractor shall provide samples of the following:
  - a. Packing slip
  - b. Invoice
  - c. MARC record file
  - d. Spine label

# **V. PROPOSAL PREPARATION AND SUBMISSION**

## **A. GENERAL INSTRUCTIONS**

**To ensure timely and adequate consideration of your proposal, offerors are to limit all contact, whether verbal or written, pertaining to this RFP to the James Madison University Procurement Office for the duration of this Proposal process. Failure to do so may jeopardize further consideration of offeror's proposal.**

1. RFP Response: In order to be considered for selection, the **offeror shall submit a complete response to this RFP**; and shall submit to the issuing Purchasing Agency:
  - a. **One (1) original and two (2) copies** of the entire proposal, INCLUDING ALL ATTACHMENTS. Any proprietary information should be clearly marked in accordance with 3.f. below.
  - b. **One (1) electronic copy in WORD format or searchable PDF (CD or flash drive)** of the entire proposal, INCLUDING ALL ATTACHMENTS. Any proprietary information should be clearly marked in accordance with 3.f. below.
  - c. Should the proposal contain **proprietary information**, provide **one (1) redacted hard copy** of the proposal and all attachments with **proprietary portions removed or blacked out**. This copy should be clearly marked "*Redacted Copy*" on the front cover.

The classification of an entire proposal document, line item prices, and/or total proposal prices as proprietary or trade secrets is not acceptable. JMU shall not be responsible for the Contractor's failure to exclude proprietary information from this redacted copy.

No other distribution of the proposal shall be made by the offeror.

2. The version of the solicitation issued by JMU Procurement Services, as amended by an addenda, is the mandatory controlling version of the document. Any modification of, or additions to, the solicitation by the offeror shall not modify the official version of the solicitation issued by JMU Procurement services unless accepted in writing by the University. Such modifications or additions to the solicitation by the offeror may be cause for rejection of the proposal; however, JMU reserves the right to decide, on a case-by-case basis in its sole discretion, whether to reject such a proposal. If the modification or additions are not identified until after the award of the contract, the controlling version of the solicitation document shall still be the official state form issued by Procurement Services.
3. 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 submissions of missing information and/or giving a lowered evaluation of the proposal. Proposals which 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 shall 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 the 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 offeror's 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 RFP 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 the offeror shall not be subject to public disclosure under the Virginia Freedom of Information Act; however, the offeror must invoke the protection of Section 2.2-4342F of the Code of Virginia, in writing, either before or at the time the data 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 materials 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 and return of the proposal.
4. Oral Presentation: Offerors who submit a proposal in response to this RFP may be required to give an oral presentation of their proposal to VASCUPP. This provides an opportunity for the offeror to clarify or elaborate on the proposal. James Madison University will schedule the time and location of these presentations. Oral presentations are an option of VASCUPP and may or may not be conducted. Therefore, proposals should be complete.

#### B. SPECIFIC PROPOSAL INSTRUCTIONS

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

1. Return RFP cover sheet and all addenda acknowledgements, if any, signed and filled out as required.
2. Plan and methodology for providing the goods/services as described in Section IV. Statement of Needs of this Request for Proposal.
3. A written narrative statement to include, but not be limited to, the expertise, qualifications, and experience of the firm and resumes of specific personnel to be assigned to perform the work.
4. Offeror Data Sheet, included as *Attachment A* to this RFP.
5. Small Business Subcontracting Plan, included as *Attachment B* to this RFP. Offeror shall provide a Small Business Subcontracting plan which summarizes the planned utilization of Department of Small Business and Supplier Diversity (SBSD)-certified small businesses which include businesses owned by women and minorities, when they have received Department of Small Business and Supplier Diversity (SBSD) small business certification, under the contract to be awarded as a result of this solicitation. This is a

requirement for all prime contracts in excess of \$100,000 unless no subcontracting opportunities exist.

6. Identify the amount of sales your company had during the last twelve months with each VASCUPP Member Institution. A list of VASCUPP Members can be found at: [www.VASCUPP.org](http://www.VASCUPP.org).
7. Proposed Cost. See Section X. Pricing Schedule of this Request for Proposal.

## **VI. EVALUATION AND AWARD CRITERIA**

### **A. EVALUATION CRITERIA**

Proposals shall be evaluated by VASCUPP using the following criteria:

1. Quality of products/services offered and suitability for intended purposes
2. Qualifications and experience of offeror in providing the goods/services
3. Specific plans or methodology to be used to perform the services
4. Participation of Small, Women-Owned, & Minority (SWaM) Businesses
5. Cost

Allocation of points for evaluation criteria will be published to the eVA solicitation posting prior to the closing date and time.

- B. **AWARD TO MULTIPLE OFFERORS:** 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 reserves the right to make multiple awards as a result of this solicitation. 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. 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. **AWARD OF CONTRACT:** Award of a contract to perform services as described in this RFP does not obligate VASCUPP schools to use the contract and individual VASCUPP institutions will have the option of utilizing or not utilizing a particular contractor that has been awarded a contract.

## VII. GENERAL TERMS AND CONDITIONS

- A. PURCHASING MANUAL: This solicitation is subject to the provisions of the Commonwealth of Virginia's Purchasing Manual for Institutions of Higher Education and Their Vendors and any revisions thereto, which are hereby incorporated into this contract in their entirety. A copy of the manual is available for review at the purchasing office. In addition, the manual may be accessed electronically at <http://www.jmu.edu/procurement> or a copy can be obtained by calling Procurement Services at (540) 568-3145.
- 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 and any litigation with respect thereto shall be brought in the courts of the Commonwealth. The Contractor shall comply with applicable federal, state and local laws 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 §10 of the Rules Governing Procurement, Chapter 2, Exhibit J, Attachment 1 (available for review at <http://www.jmu.edu/procurement>). 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 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. (*§6 of the Rules Governing Procurement*).

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, 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 these requirements.
- 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 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: 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 submitting their proposals, offerors certify that they are not currently debarred by the Commonwealth of Virginia from submitting proposals on contracts for the type of goods and/or services covered by this solicitation, nor are they an agent of any person or entity that is currently so debarred.
- 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 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 the date of offset 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 researched and challenged, and that portion of the invoice held in abeyance until a settlement can be reached. Upon determining that invoiced charges are not reasonable, the Commonwealth shall promptly notify the contractor, in writing, as to those charges which it considers unreasonable and the basis for the determination. A contractor may not institute legal action unless a settlement cannot be reached within thirty (30) days of notification. 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 (*Rules Governing Procurement, Chapter 2, Exhibit J, Attachment 1 § 53; available for review at <http://www.jmu.edu/procurement>*).

2. To Subcontractors:

- a. A contractor awarded a contract under this solicitation is hereby obligated:
    - (1) To pay the subcontractor(s) within seven (7) days of the contractor's receipt of payment from the Commonwealth 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 subcontractors, 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: Paragraphs A through J of these General Terms and Conditions and the Commonwealth of Virginia Purchasing Manual for Institutions of Higher Education and their Vendors, 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 scope of the contract. An 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. 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 Purchasing Manual for Institutions of Higher Education and their Vendors. 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. INSURANCE: By signing and submitting a proposal under this solicitation, the 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 § 25 of the Rules Governing Procurement – Chapter 2, Exhibit J, Attachment 1, and 65.2-800 et. Seq. of the Code of Virginia (available for review at <http://www.jmu.edu/procurement>) The offeror further certifies that the contractor and any subcontractors will maintain these insurance coverage during the entire term of the contract and that all insurance coverage will be provided by insurance companies authorized to sell insurance in Virginia by the Virginia State Corporation Commission.

MINIMUM INSURANCE COVERAGES AND LIMITS REQUIRED FOR MOST CONTRACTS:

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 requirement 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 must be named as an additional insured and so endorsed on the policy.
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.)*

- R. ANNOUNCEMENT OF AWARD: Upon the award or the announcement of the decision to award a contract over \$100,000, as a result of this solicitation, the purchasing agency will publicly post such notice on the DGS/DPS eVA web site ([www.eva.virginia.gov](http://www.eva.virginia.gov)) for a minimum of 10 days.
- S. DRUG-FREE WORKPLACE: 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.

- T. NONDISCRIMINATION OF CONTRACTORS: An offeror, or contractor shall not be discriminated against in the solicitation or award of this contract because of race, religion, color, sex, national origin, age, disability, faith-based organizational status, any other basis prohibited by state law relating to discrimination in employment or because the 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.
- U. eVA BUSINESS TO GOVERNMENT VENDOR REGISTRATION, CONTRACTS, AND ORDERS: The eVA Internet electronic procurement solution, website portal [www.eVA.virginia.gov](http://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 eprocurement solution by completing the free eVA Vendor Registration. All offerors must register in eVA and pay the Vendor Transaction Fees specified below; failure to register will result in the proposal being rejected. Vendor transaction fees are determined by the date the original purchase order is issued and the current fees are as follows:

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

1. For orders issued July 1, 2014 and after, the Vendor Transaction Fee is:

- a. Department of Small Business and Supplier Diversity (SBSD) certified Small Businesses: 1% capped at \$500 per order.
  - b. Businesses that are not Department of Small Business and Supplier Diversity (SBSD) certified Small Businesses: 1% capped at \$1,500 per order.
- 2. For orders issued prior to July 1, 2014 the vendor transaction fees can be found at [www.eVA.virginia.gov](http://www.eVA.virginia.gov).
- 3. The specified vendor transaction fee will be invoiced by the Commonwealth of Virginia Department of General Services approximately 60 days after the corresponding purchase order is issued and payable 30 days after the invoice date. Any adjustments (increases/decreases) will be handled through purchase order changes.
- V. AVAILABILITY OF FUNDS: It is understood and agreed between the parties herein that the Commonwealth of Virginia shall be bound hereunder only to the extent of the funds available or which may hereafter become available for the purpose of this agreement.
- W. PRICING CURRENCY: Unless stated otherwise in the solicitation, offerors shall state offered prices in U.S. dollars.
- X. E-VERIFY REQUIREMENT OF ANY CONTRACTOR: Any employer with more than an average of 50 employees for the previous 12 months entering into a contract in excess of \$50,000 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 any awarded contract.
- Y. 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.
- Z. 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 a competitive sealed solicitation only the information furnished with the proposal will be considered in the evaluation. Failure to furnish adequate data for evaluation purposes may result in declaring a proposal nonresponsive. Unless the offeror clearly indicates in its proposal that the product offered is an equivalent product, such proposal will be considered to offer the brand name product referenced in the solicitation.
- AA. 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.

## VIII. SPECIAL TERMS AND CONDITIONS

- A. AUDIT: The Contractor hereby agrees to retain all books, records, systems, 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 Commonwealth of Virginia, 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. CANCELLATION OF CONTRACT: James Madison University 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 be terminated by either party, 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.
- C. IDENTIFICATION OF PROPOSAL ENVELOPE: The signed proposal should be returned in a separate envelope or package, sealed and identified as follows:

From:			
	Name of Offeror	Due Date	Time
	Street or Box No.		RFP #
	City, State, Zip Code		RFP Title
Name of Purchasing Officer:			

The envelope should be addressed as directed on the title page of the solicitation.

The offeror takes the risk that if the envelope is not marked as described above, it may be inadvertently opened and the information compromised, which may cause the proposal to be disqualified. Proposals may be hand-delivered to the designated location in the office issuing the solicitation. No other correspondence or other proposals should be placed in the envelope.

- D. LATE PROPOSALS: To be considered for selection, proposals must be received by the issuing office by the designated date and hour. The official time used in the receipt of proposals is that time on the automatic time stamp machine in the issuing office. Proposals received in the issuing office after the date and hour designated are automatically non-responsive and will not be considered. The University is not responsible for delays in the delivery of mail by the U.S. Postal Service, private couriers, or the intra university mail system. It is the sole responsibility of the offeror to ensure that its proposal reaches the issuing office by the designated date and hour.
- E. UNDERSTANDING OF REQUIREMENTS: It is the responsibility of each offeror to inquire about and clarify any requirements of this solicitation that is not understood. The University will not be bound by oral explanations as to the meaning of specifications or language contained in this solicitation. Therefore, all inquiries deemed to be substantive in nature must be in writing and submitted to the responsible buyer in the Procurement Services Office. Offerors must ensure that written inquiries reach the buyer at least five (5) days prior to the time set for receipt of offerors proposals. A copy of all queries and the respective response will be provided in the form of an addendum to all offerors who have indicated an interest in responding to this

solicitation. Your signature on your Offer certifies that you fully understand all facets of this solicitation. These questions may be sent by Fax to 540/568-7935.

- F. RENEWAL OF CONTRACT: This contract may be renewed by the Commonwealth for two (2) successive three year periods under the terms and conditions of the original contract except as stated in 1. and 2. below. Price increases may be negotiated only at the time of renewal. Written notice of the Commonwealth's intention to renew shall be given approximately 90 days prior to the expiration date of each contract period.
1. If the Commonwealth elects to exercise the option to renew the contract for an additional one-year period, the contract price(s) for the additional one year shall not exceed the contract price(s) of the original contract increased/decreased by no more than the percentage increase/decrease of the other services category of the CPI-W section of the Consumer Price Index of the United States Bureau of Labor Statistics for the latest twelve months for which statistics are available.
  2. If during any subsequent renewal periods, the Commonwealth elects to exercise the option to renew the contract, the contract price(s) for the subsequent renewal period shall not exceed the contract price(s) of the previous renewal period increased/decreased by more than the percentage increase/decrease of the other services category of the CPI-W section of the Consumer Price Index of the United States Bureau of Labor Statistics for the latest twelve months for which statistics are available.
- G. SUBMISSION OF INVOICES: All invoices shall be submitted within sixty days of contract term expiration for the initial contract period as well as for each subsequent contract renewal period. Any invoices submitted after the sixty-day period will not be processed for payment.
- H. OPERATING VEHICLES ON JAMES MADISON UNIVERSITY CAMPUS: Operating vehicles on sidewalks, plazas, and areas heavily used by pedestrians is prohibited. In the unlikely event a driver should find it necessary to drive on James Madison University sidewalks, plazas, and areas heavily used by pedestrians, the driver must yield to pedestrians. For a complete list of parking regulations, please go to [www.jmu.edu/parking](http://www.jmu.edu/parking); or to acquire a service representative parking permit, contact Parking Services at 540.568.3300. The safety of our students, faculty and staff is of paramount importance to us. Accordingly, violators may be charged.
- I. COOPERATIVE PURCHASING / USE OF AGREEMENT BY THIRD PARTIES: It is the intent of this solicitation and resulting contract(s) to allow for cooperative procurement. Accordingly, any public body, (to include government/state agencies, political subdivisions, etc.), cooperative purchasing organizations, public or private health or educational institutions or any University related foundation and affiliated corporations may access any resulting contract if authorized by the Contractor.

Participation in this cooperative procurement is strictly voluntary. If authorized by the Contractor(s), the resultant contract(s) will be extended to the entities indicated above to purchase goods and services in accordance with contract terms. As a separate contractual relationship, the participating entity will place its own orders directly with the Contractor(s) and shall fully and independently administer its use of the contract(s) to include contractual disputes, invoicing and payments without direct administration from the University. No modification of this contract or execution of a separate agreement is required to participate; however, the participating entity and the Contractor may modify the terms and conditions of this contract to accommodate specific governing laws, regulations, policies, and business goals



required by the participating entity. Any such modification will apply solely between the participating entity and the Contractor.

The Contractor will notify the University in writing of any such entities accessing this contract. The Contractor will provide semi-annual usage reports for all entities accessing the contract. The University shall not be held liable for any costs or damages incurred by any other participating entity as a result of any authorization by the Contractor to extend the contract. It is understood and agreed that the University is not responsible for the acts or omissions of any entity and will not be considered in default of the contract no matter the circumstances.

Use of this contract(s) does not preclude any participating entity from using other contracts or competitive processes as needed.

J. SMALL BUSINESS SUBCONTRACTING AND EVIDENCE OF COMPLIANCE:

1. It is the goal of the Commonwealth that 42% of its purchases are made from small businesses. This includes discretionary spending in prime contracts and subcontracts. All potential offerors are required to submit a Small Business Subcontracting Plan. Unless the offeror is registered as a Department of Small Business and Supplier Diversity (SBSD)-certified small business and where it is practicable for any portion of the awarded contract to be subcontracted to other suppliers, the contractor is encouraged to offer such subcontracting opportunities to SBSD-certified small businesses. This shall not exclude SBSD-certified women-owned and minority-owned businesses when they have received SBSD small business certification. No offeror or subcontractor shall be considered a Small Business, a Women-Owned Business or a Minority-Owned Business unless certified as such by the Department of Small Business and Supplier Diversity (SBSD) by the due date for receipt of proposals. If small business subcontractors are used, the prime contractor agrees to report the use of small business subcontractors by providing the purchasing office at a minimum the following information: name of small business with the SBSD certification number or FEIN, phone number, total dollar amount subcontracted, category type (small, women-owned, or minority-owned), and type of product/service provided. **This information shall be submitted to: JMU Office of Procurement Services, Attn: SWAM Subcontracting Compliance, MSC 5720, Harrisonburg, VA 22807.**
2. 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 with every request for payment, evidence of compliance (subject only to insubstantial shortfalls and to shortfalls arising from subcontractor default) with the small business subcontracting plan. **This information shall be submitted to: JMU Office of Procurement Services, SWAM Subcontracting Compliance, MSC 5720, Harrisonburg, VA 22807.** When such business has been subcontracted to these firms and upon completion of the contract, the contractor agrees to furnish the purchasing office at a minimum the following information: name of firm with the Department of Small Business and Supplier Diversity (SBSD) certification number or FEIN number, phone number, total dollar amount subcontracted, category type (small, women-owned, or minority-owned), and type of product or service provided. Payment(s) may be withheld until compliance with the plan is received and confirmed by the agency or institution. The agency or institution reserves the right to pursue other appropriate remedies to include, but not be limited to, termination for default.
3. Each prime contractor who wins an award valued over \$200,000 shall deliver to the contracting agency or institution with every request for payment, information on use of subcontractors that are not Department of Small Business and Supplier Diversity (SBSD)-

certified small businesses. When such business has been subcontracted to these firms and upon completion of the contract, the contractor agrees to furnish the purchasing office at a minimum the following information: name of firm, phone number, FEIN number, total dollar amount subcontracted, and type of product or service provided. **This information shall be submitted to: JMU Office of Procurement Services, Attn: SWAM Subcontracting Compliance, MSC 5720, Harrisonburg, VA 22807.**

- K. 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 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.
- L. PUBLIC POSTING OF COOPERATIVE CONTRACTS: James Madison University maintains a web-based contracts database with a public gateway access. Any resulting cooperative contract/s to this solicitation will be posted to the publicly accessible website. Contents identified as proprietary information will not be made public.
- M. CRIMINAL BACKGROUND CHECKS OF PERSONNEL ASSIGNED BY CONTRACTOR TO PERFORM WORK ON UNIVERSITY PROPERTY: The Contractor shall obtain criminal background checks on all of their contracted employees who will be assigned to perform services on University property. The results of the background checks will be directed solely to the Contractor. The Contractor bears responsibility for confirming to the James Madison University contract administrator that the background checks have been completed prior to work being performed by their employees or subcontractors. The Contractor shall only assign to work on the University campus those individuals whom it deems qualified and permissible based on the results of completed background checks. Notwithstanding any other provision herein, and to ensure the safety of students, faculty, staff and facilities, the University reserves the right to approve or disapprove any contract employee that will work on University property. Disapproval by the University will solely apply to University property and should have no bearing on the Contractor's employment of an individual outside of this contract.
- N. INDEMNIFICATION: Contractor agrees to indemnify, defend and hold harmless the Commonwealth of Virginia, its officers, agents, and employees from any claims, damages and actions of any kind or nature, whether at law or in equity, arising from or caused by the use of any materials, goods, or equipment of any kind or nature furnished by the contractor/any services of any kind or nature furnished by the contractor, provided that such liability is not attributable to the sole negligence of the using agency or to failure of the using agency to use the materials, goods, or equipment in the manner already and permanently described by the contractor on the materials, goods or equipment delivered.
- O. ADDITIONAL GOODS AND SERVICES: The University may acquire other goods or services that the supplier provides than those specifically solicited. The University reserves the right, subject to mutual agreement, for the Contractor to provide additional goods and/or services under the same pricing, terms, and conditions and to make modifications or enhancements to the existing goods and services. Such additional goods and services may include other products, components, accessories, subsystems, or related services that are newly

introduced during the term of this Agreement. Such additional goods and services will be provided to the University at favored nations pricing, terms, and conditions.

- P. ADVERTISING: In the event a contract is awarded for supplies, equipment, or services resulting from this proposal, no indication of such sales or services will be used in product literature or advertising without the express written consent of the University. The contractor shall not state in any of its advertising or product literature that VASCUPP (or a singular VASCUPP member) has purchased or uses any of its products or services, and the contractor shall not include VASCUPP (or a singular VASCUPP member) in any client list in advertising and promotional materials without the express written consent of the University.
- Q. 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.
- R. 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.

## **IX. METHOD OF PAYMENT**

The contractor will be paid on the basis of invoices submitted in accordance with the solicitation and any negotiations. James Madison University recognizes the importance of expediting the payment process for our vendors and suppliers. We are asking our vendors and suppliers to enroll in the Wells Fargo Bank single use Commercial Card Number process or electronic deposit (ACH) to your bank account so that future payments are made electronically. Contractors signed up for the Wells Fargo Bank single use Commercial Card Number process will receive the benefit of being paid in Net 15 days. Additional information is available online at:

<http://www.jmu.edu/financeoffice/accounting-operations-disbursements/cash-investments/vendor-payment-methods.shtml>

Other VASCUPP institutions may have different methodologies regarding invoicing. Each entity is responsible for negotiating their invoicing options and payment terms.

## **X. PRICING SCHEDULE**

The offeror shall provide pricing for all products and services included in proposal indicating one-time and on-going costs. The resulting contract will be cooperative and pricing shall be inclusive for the attached Zone Map. Specifically, the offeror shall address the following:

### **A. For Print or Tangible Materials**

1. Provide the discount structure to be applied to the publisher's list price. Specify how individual institutional volume would impact discounts. Confirm that the publisher's list price shall not be marked up in order to give a discount. Confirm that the proposed discount

shall be firm for the entire period of the contract, and through any subsequent renewal periods.

2. Provide the method for computing discounts and/or service charges for the types of publishers, and material types.
3. Provide a listing of any applicable charges for shipping and handling.
4. Provide the charge per volume for binding services.
5. Provide cost per title for any services available for supplying MARC records at the point of request and/or with shipment.
6. Provide cost per title for processing services such as security strip placement, spine label production and placement, and property stamps.
7. Provide the average discounted selling price per volume for the last twelve (12) months for the combined VASCUPP schools and project the average cost per monograph to be supplied in the next fiscal year. Separate average costs per volume should be provided for each of the broad subject categories.
8. Provide any additional charges for special services such as rush orders.

B. For eBooks

1. Describe the methodology for determining ebook pricing across multiple ebook publishers/aggregators.
2. Specify institutional level volume discounts for providing access to multiple resources. Provide opportunities for increasing institutional level volume discounts.
3. List any platform fees for accessing purchased titles.
4. Provide information on any added fees for supplying MARC records or other metadata records.
5. Outline pricing model(s) for any DDA or PDA program such as short term loans, simultaneous users, etc.
6. Outline pricing for service options for alumni access to content.

C. Describe offered discounts or pricing benefits based on the combined annual spend of the VASCUPP schools.

D. Describe other services/resources being offered and specify associated cost.

E. Provide all costs associated with training.

F. List any additional costs or fee-based services associated with print or electronic monographs such as license management, database surcharges, custom reports, enhancements, etc.

G. Specify any associated cost that has not already been identified.

H. Specify any additional discounts available for early payment of invoices (*e.g., 1% Net 15/30*).

- I. Specify any associated charge card processing fees, if applicable, to be billed to the university. Vendors shall provide their VISA registration number when indicating charge card processing fees. Any vendor requiring information on VISA registration may refer to <https://usa.visa.com/support/small-business/regulations-fees.html> and for questions <https://usa.visa.com/dam/VCOM/global/support-legal/documents/merchant-surcharging-qa-for-web.pdf>.

## **XI. ATTACHMENTS**

Attachment A: Offeror Data Sheet

Attachment B: Small, Women, and Minority-owned Business (SWaM) Utilization Plan

Attachment C: Standard Contract Sample

Attachment D: Zone Map

## ATTACHMENT A

### OFFEROR DATA SHEET

#### TO BE COMPLETED BY OFFEROR

1. QUALIFICATIONS OF OFFEROR: Offerors must have the capability and capacity in all respects to fully satisfy the contractual requirements.
2. YEARS IN BUSINESS: Indicate the length of time you have been in business providing these types of goods and services.

Years \_\_\_\_\_ Months \_\_\_\_\_

3. REFERENCES: Indicate below a listing of at least five (5) organizations, either commercial or governmental/educational, that your agency is servicing. Include the name and address of the person the purchasing agency has your permission to contact.

CLIENT	LENGTH OF SERVICE	ADDRESS	CONTACT PERSON/PHONE #
--------	-------------------	---------	---------------------------

_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

4. List full names and addresses of Offeror and any branch offices which may be responsible for administering the contract.

_____
_____
_____
_____

5. RELATIONSHIP WITH THE COMMONWEALTH OF VIRGINIA: Is any member of the firm an employee of the Commonwealth of Virginia who has a personal interest in this contract pursuant to the [CODE OF VIRGINIA](#), SECTION 2.2-3100 – 3131?

[ ] YES [ ] NO

IF YES, EXPLAIN: \_\_\_\_\_

_____
_____
_____

## ATTACHMENT B

### Small, Women and Minority-owned Businesses (SWaM) Utilization Plan

**Offeror Name:** \_\_\_\_\_ **Preparer Name:** \_\_\_\_\_

**Date:** \_\_\_\_\_

Is your firm a **Small Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, certification number: \_\_\_\_\_ Certification date: \_\_\_\_\_

Is your firm a **Woman-owned Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, certification number: \_\_\_\_\_ Certification date: \_\_\_\_\_

Is your firm a **Minority-Owned Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, certification number: \_\_\_\_\_ Certification date: \_\_\_\_\_

Is your firm a **Micro Business** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, certification number: \_\_\_\_\_ Certification date: \_\_\_\_\_

**Instructions:** *Populate the table below to show your firm's plans for utilization of small, women-owned and minority-owned business enterprises in the performance of the contract. Describe plans to utilize SWAMs businesses as part of joint ventures, partnerships, subcontractors, suppliers, etc.*

**Small Business:** "Small business " means a business, independently owned or operated by one or more persons who are citizens of the United States or non-citizens who are in full compliance with United States immigration law, which, together with affiliates, has 250 or fewer employees, or average annual gross receipts of \$10 million or less averaged over the previous three years.

**Woman-Owned Business Enterprise:** A business concern which is at least 51 percent owned by one or more women who are U.S. citizens or legal resident aliens, or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more women, and whose management and daily business operations are controlled by one or more of such individuals. **For purposes of the SWAM Program, all certified women-owned businesses are also a small business enterprise.**

**Minority-Owned Business Enterprise:** A business concern which is at least 51 percent owned by one or more minorities or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more minorities and whose management and daily business operations are controlled by one or more of such individuals. **For purposes of the SWAM Program, all certified minority-owned businesses are also a small business enterprise.**

**Micro Business** is a certified Small Business under the SWaM Program and has no more than twenty-five (25) employees **AND** no more than \$3 million in average annual revenue over the three-year period prior to their certification.

**All small, women, and minority owned businesses must be certified by the Commonwealth of Virginia Department of Small Business and Supplier Diversity (SBSD) to be counted in the SWAM program. Certification applications are available through SBSD at 800-223-0671 in Virginia, 804-786-6585 outside Virginia, or online at <http://www.sbsd.virginia.gov/> (Customer Service).**

***RETURN OF THIS PAGE IS REQUIRED***

**ATTACHMENT B (CNT'D)**  
Small, Women and Minority-owned Businesses (SWaM) Utilization Plan

Procurement Name and Number: \_\_\_\_\_

Date Form Completed: \_\_\_\_\_

Listing of Sub-Contractors, to include, Small, Woman Owned and Minority Owned Businesses  
for this Proposal and Subsequent Contract

Offeror / Proposer:

\_\_\_\_\_  
Firm

\_\_\_\_\_  
Address

\_\_\_\_\_  
Contact Person/No.

Sub-Contractor's Name and Address	Contact Person & Phone Number	SBSD Certification Number	Services or Materials Provided	Total Subcontractor Contract Amount (to include change orders)	Total Dollars Paid Subcontractor to date (to be submitted with request for payment from JMU)

*(Form shall be submitted with proposal and if awarded, again with submission of each request for payment)*

***RETURN OF THIS PAGE IS REQUIRED***



ATTACHMENT C



**COMMONWEALTH OF VIRGINIA  
STANDARD CONTRACT**

Contract No. \_\_\_\_\_

This contract entered into this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, by \_\_\_\_\_ hereinafter called the "Contractor" and Commonwealth of Virginia, James Madison University called the "Purchasing Agency".

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

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

PERIOD OF PERFORMANCE From \_\_\_\_\_ through \_\_\_\_\_

The contract documents shall consist of:

- (1) This signed form;
- (2) The following portions of the Request for Proposals dated \_\_\_\_\_:
  - (a) The Statement of Needs,
  - (b) The General Terms and Conditions,
  - (c) The Special Terms and Conditions together with any negotiated modifications of those Special Conditions;
  - (d) List each addendum that may be issued
- (3) The Contractor's Proposal dated \_\_\_\_\_ and the following negotiated modification to the Proposal, all of which documents are incorporated herein.
  - (a) Negotiations summary dated \_\_\_\_\_.

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

CONTRACTOR:

PURCHASING AGENCY:

By: \_\_\_\_\_  
(Signature)

By: \_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Printed Name)

\_\_\_\_\_  
(Printed Name)

Title: \_\_\_\_\_

Title: \_\_\_\_\_

## ATTACHMENT D

### Zone Map



## Virginia Association of State College & University Purchasing Professionals (VASCUPP)

### List of member institutions by zones

<b><u>Zone 1</u></b> George Mason University (Fairfax)	<b><u>Zone 2</u></b> James Madison University (Harrisonburg)	<b><u>Zone 3</u></b> University of Virginia (Charlottesville)
<b><u>Zone 4</u></b> University of Mary Washington (Fredericksburg)	<b><u>Zone 5</u></b> College of William and Mary (Williamsburg) Old Dominion University (Norfolk)	<b><u>Zone 6</u></b> Virginia Commonwealth University (Richmond)
<b><u>Zone 7</u></b> Longwood University (Farmville)	<b><u>Zone 8</u></b> Virginia Military Institute (Lexington) Virginia Tech (Blacksburg) Radford University (Radford)	<b><u>Zone 9</u></b> University of Virginia - Wise (Wise)