

This Proposal has been Especially Prepared for:
The State of Oklahoma

Solicitation # SW16012, State Wide Contract for Books
Due: July 19, 2016 @ 2:00 p.m.



Submitted By:
Brodart Co.
500 Arch Street
Williamsport, PA 17701
800.233.8467



Brodart Books & Library Services
500 Arch Street, Williamsport, PA 17701
P: 570•326•2461 F: 570•651•1639
www.brodartbooks.com

July 13, 2016

Office of Management and Enterprise Services
Central Purchasing
5005 N.Lincoln Blvd., Suite 300
Oklahoma City, OK 73105

RE: Solicitation # SW16012, State Wide Contract for Books
DUE: July 19, 2016 @ 3:00 p.m.

Dear Sir or Madam:

Brodart is pleased to provide this document in response to the State of Oklahoma's invitation to bid for the procurement of books for the period of twelve months with the option to renew for up to four one-year periods.

Brodart is the premier supplier of circulation-ready materials to libraries. A full-service library company since 1939, we deliver carefully selected, cataloged, and processed titles. Today, Brodart offers state-of-the-art online tools, bibliographic services, and consulting exclusively to libraries. Our customers select from over four million items. Please see Attachment A for a description of the products and services Brodart offers.

Our distribution facility manages over 265 thousand titles and five million volumes annually, and deals with more than 45 thousand publishers. Brodart's inventory and purchasing profiles are based on the library market. We do not supply books to the retail market. Additionally, Brodart's single inventory location in Williamsport, Pennsylvania enables us to fill orders quickly and efficiently. Our first pick percentage and total order fulfillment are among the highest in the industry.

For questions about our products and services, please contact your Brodart Sales Manager, Jason Goodson, by calling 800.233.8467, ext. 6312 or e-mailing Jason.Goodson@brodart.com. Questions related to our bid response or notification of award should be directed to Tara Miller at 800.233.8467, ext. 6233 or bookbids@brodart.com.

Brodart's partnerships with libraries are built on experience, trust, and communication. We are confident that, if awarded this contract, we can help you achieve your library's goals.

We appreciate this opportunity to submit our proposal for your consideration and request an official tabulation of competitive bidding.

Sincerely,

Lisa Miosi
Director, Customer Care

LM/tlm

Enclosures

cc: Jason Goodson, Sales Manager



Solicitation

1. Solicitation #: SW16012

2. Solicitation Issue Date: June 7, 2016

3. Brief Description of Requirement:

Solicitation for Statewide Contract for Books.

4. Response Due Date¹: July 5th, 2016

Time: 3:00PM CST/CDT

5. Issued By and RETURN SEALED BID TO²:

Personal, U.S. Postal or Common Carrier Delivery:

Office of Management and Enterprise Services
Central Purchasing
5005 N. Lincoln Blvd., Suite 300
Oklahoma City, OK 73105

6. Solicitation Type (type "X" at one below):

- ☐ Invitation to Bid
- ☒ Request for Proposal
- ☐ Request for Quote

7. Requesting Agency: OMES Central Purchasing

8. Contracting Officer:

Name: Gerald Elrod
Phone: 405/522-1037
Email: Gerald.Elrod@omes.ok.gov

¹ Amendments to solicitation may change the Response Due Date (read GENERAL PROVISIONS, section 3, "Solicitation Amendments")

² If "U.S. Postal Delivery" differs from "Carrier Delivery", use "Carrier Delivery" for courier or personal deliveries



Responding Bidder Information

"Certification for Competitive Bid and Contract" MUST be submitted along with the response to the Solicitation.

1. RE: Solicitation # SW16012

2. Bidder General Information:

FEI / SSN : 23-2248758

VEN ID: 0000068687 (Loc:0001)

Company Name: Brodart Co.

3. Bidder Contact Information:

Address: 500 Arch Street

City: Williamsport

State: PA Zip Code: 17701

Contact Name: Tara Miller

Contact Title: Supervisor, Bid Department

Phone #: 800.233.8467

FAX#: 570.651.1639

Email: bids@brodart.com

Website: www.brodart.com

4. Oklahoma Sales Tax Permit¹:

☒ YES – Permit #: 1015833403

☐ NO – Exempt pursuant to Oklahoma Laws or Rules

5. Registration with the Oklahoma Secretary of State:

☒ YES - Filing Number: 2912565113

☐ NO - Prior to the contract award, the successful bidder will be required to register with the Secretary of State or must attach a signed statement that provides specific details supporting the exemption the supplier is claiming (www.sos.ok.gov or 405-521-3911).

6. Workers' Compensation Insurance Coverage:

Bidder is required to provide with the bid a certificate of insurance showing proof of compliance with the Oklahoma Workers' Compensation Act.

☒ YES – include a certificate of insurance with the bid

☐ NO - attach a signed statement that provides specific details supporting the exemption you are claiming from the Workers' Compensation Act (Note: Pursuant to Attorney General Opinion #07-8, the exemption from 85 O.S. 2011, § 311 applies only to employers who are natural persons, such as sole proprietors, and does not apply to employers who are entities created by law, including but not limited to corporations, partnerships and limited liability companies.)²

Authorized Signature

July 13, 2016

Date

Lisa Miosi

Printed Name

Director, Customer Care

Title

¹ For frequently asked questions concerning Oklahoma Sales Tax Permit, see <http://www.tax.ok.gov/fag/fagbussales.html>

² For frequently asked questions concerning workers' compensation insurance, see <http://www.ok.gov/oid/faqs.html#c221>



CERTIFICATE OF LIABILITY INSURANCE

DATE(MM/DD/YYYY)
12/29/2015

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Aon Risk Services Central, Inc. Hershey PA Office 325 Lauderhill Rd. Suite 201 Hershey PA 17033 USA	CONTACT NAME:	
	PHONE (A/C. No. Ext): (866) 283-7122	FAX (A/C. No.): 800-363-0105
INSURED Brodart Co. 500 Arch St. Williamsport PA 17701 USA	E-MAIL ADDRESS:	
	INSURER(S) AFFORDING COVERAGE	
	NAIC #	
	INSURER A: The Phoenix Insurance Company	
	INSURER B:	
	INSURER C:	
INSURER D:		
INSURER E:		
INSURER F:		

Holder Identifier :

COVERAGES

CERTIFICATE NUMBER: 570060732188

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

Limits shown are as requested

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	COMMERCIAL GENERAL LIABILITY						EACH OCCURRENCE
	<input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR						DAMAGE TO RENTED PREMISES (Ea occurrence)
							MED EXP (Any one person)
							PERSONAL & ADV INJURY
	GEN'L AGGREGATE LIMIT APPLIES PER:						GENERAL AGGREGATE
	<input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC						PRODUCTS - COMP/OP AGG
	OTHER:						
	AUTOMOBILE LIABILITY						COMBINED SINGLE LIMIT (Ea accident)
	<input type="checkbox"/> ANY AUTO						BODILY INJURY (Per person)
	<input type="checkbox"/> ALL OWNED AUTOS						BODILY INJURY (Per accident)
	<input type="checkbox"/> HIRED AUTOS						PROPERTY DAMAGE (Per accident)
	<input type="checkbox"/> SCHEDULED AUTOS						
	<input type="checkbox"/> NON-OWNED AUTOS						
	UMBRELLA LIAB						EACH OCCURRENCE
	<input type="checkbox"/> EXCESS LIAB						AGGREGATE
	<input type="checkbox"/> DED <input type="checkbox"/> RETENTION						
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY			YNU8489M148	01/01/2016	01/01/2017	X PER STATUTE
	ANY PROPRIETOR / PARTNER / EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)	Y/N	N/A				E.L. EACH ACCIDENT
	If yes, describe under DESCRIPTION OF OPERATIONS below						E.L. DISEASE-EA EMPLOYEE
							E.L. DISEASE-POLICY LIMIT

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Workers' Compensation coverage excludes monopolistic states of AK, OH, ND, WA and WY.

CERTIFICATE HOLDER

CANCELLATION

State of Oklahoma Department of Central Services Central Purchasing PO Box 528803 Oklahoma City OK 73152-8803 USA	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE <i>Aon Risk Services Central, Inc.</i>

Certificate No : 570060732188



State of Oklahoma

**Certification for Competitive
Bid and/or Contract
(Non-Collusion Certification)**

NOTE: A certification shall be included with any competitive bid and/or contract exceeding \$5,000.00 submitted to the State for goods or services.

Agency Name: OMES Central Purchasing Agency Number: _____

Solicitation or Purchase Order #: SW16012

Supplier Legal Name: Brodart Co.

SECTION I [74 O.S. § 85.22]:

A. For purposes of competitive bid,

1. I am the duly authorized agent of the above named bidder submitting the competitive bid herewith, for the purpose of certifying the facts pertaining to the existence of collusion among bidders and between bidders and state officials or employees, as well as facts pertaining to the giving or offering of things of value to government personnel in return for special consideration in the letting of any contract pursuant to said bid;
2. I am fully aware of the facts and circumstances surrounding the making of the bid to which this statement is attached and have been personally and directly involved in the proceedings leading to the submission of such bid; and
3. Neither the bidder nor anyone subject to the bidder's direction or control has been a party:
 - a. to any collusion among bidders in restraint of freedom of competition by agreement to bid at a fixed price or to refrain from bidding,
 - b. to any collusion with any state official or employee as to quantity, quality or price in the prospective contract, or as to any other terms of such prospective contract, nor
 - c. in any discussions between bidders and any state official concerning exchange of money or other thing of value for special consideration in the letting of a contract, nor
 - d. to any collusion with any state agency or political subdivision official or employee as to create a sole-source acquisition in contradiction to Section 85.45j.1. of this title.

B. I certify, if awarded the contract, whether competitively bid or not, neither the contractor nor anyone subject to the contractor's direction or control has paid, given or donated or agreed to pay, give or donate to any officer or employee of the State of Oklahoma any money or other thing of value, either directly or indirectly, in procuring this contract herein.

SECTION II [74 O.S. § 85.42]:

For the purpose of a contract for services, the supplier also certifies that no person who has been involved in any manner in the development of this contract while employed by the State of Oklahoma shall be employed by the supplier to fulfill any of the services provided for under said contract.

The undersigned, duly authorized agent for the above named supplier, by signing below acknowledges this certification statement is executed for the purposes of:

☒ the competitive bid attached herewith and contract, if awarded to said supplier;

OR

☐ the contract attached herewith, which was not competitively bid and awarded by the agency pursuant to applicable Oklahoma statutes.

Lisa Miosi
Supplier Authorized Signature

July 13, 2016
Certified This Date

Lisa Miosi
Printed Name

Director, Customer Care
Title

800.233.8467
Phone Number

bids@brodart.com
Email

570.651.1639
Fax Number



State of Oklahoma

Amendment of Solicitation

Date of Issuance: 06/08/2016

Solicitation No. SW16012

Requisition No. _____

Amendment No. 1

Hour and date specified for receipt of offers is changed: ☒ No ☐ Yes, to: _____ CST

Pursuant to OAC 260:115-7-30(d), this document shall serve as official notice of amendment to the solicitation identified above. Such notice is being provided to all suppliers to which the original solicitation was sent.

Suppliers submitting bids or quotations shall acknowledge receipt of this solicitation amendment prior to the hour and date specified in the solicitation as follows:

- (1) Sign and return a copy of this amendment with the solicitation response being submitted; or,
- (2) If the supplier has already submitted a response, this acknowledgement must be signed and returned prior to the solicitation deadline. All amendment acknowledgements submitted separately shall have the solicitation number and bid opening date printed clearly on the front of the envelope.

ISSUED BY and RETURN TO:

U.S. Postal Delivery:

Gerald Elrod
Contracting Officer

405 - 522 - 1037
Phone Number

, OK -
or

Personal or Common Carrier Delivery:

Gerald.Elrod@omes.ok.gov
E-Mail Address

, OK -

Description of Amendment:

a. This is to incorporate the following:

The contract has been revised as follows:

Section 4 of Page 1 of the cover page has been revised to read "July 5th, 2016".

Section D.2.1 of the RFP has been revised to read "D.2.1. The State intends to award to multiple Suppliers as a result of this Request for Proposal (RFP). Said contract will be awarded to the responsible Supplier(s) whose response, conforming to the RFP, is deemed best value."

Attachment C has been revised to read "Attachment C" in the title of the document.

Revised copies of affected documents have been posted.

b. All other terms and conditions remain unchanged.

Brodart Co.
Supplier Company Name (PRINT)

7/13/16
Date

Lisa Miosi
Authorized Representative Name (PRINT)

Director, Customer Care
Title

Lisa Miosi
Authorized Representative Signature



Amendment of Solicitation

Date of Issuance: 6/28/2016

Solicitation No. SW012

Requisition No. SW012

Amendment No. 1

Hour and date specified for receipt of offers is changed: ☐ No ☒ Yes, to: 7/19/2016 3:00 PM CST/CDT

Pursuant to OAC 260:115-7-30(d), this document shall serve as official notice of amendment to the Solicitation identified above. Such notice is being provided to all suppliers to which the original solicitation was sent.

Suppliers submitting bids or quotations shall acknowledge receipt of this solicitation amendment prior to the hour and date specified in the solicitation as follows:

- (1) Sign and return a copy of this amendment with the solicitation response being submitted; or,
- (2) If the supplier has already submitted a response, this acknowledgement must be signed and returned prior to the solicitation deadline. All amendment acknowledgements submitted separately shall have the solicitation number and bid opening date printed clearly on the front of the envelope.

ISSUED BY and RETURN TO:

U.S. Postal Delivery or Personal or Common Carrier Delivery:

Office of Management and Enterprise Services
Central Purchasing
5005 N. Lincoln Blvd., Ste. 300
Oklahoma City, OK 73105

Gerald Elrod

Contracting Officer

405 - 522 - 1037

Phone Number

Gerald.elrod@omes.ok.gov

E-Mail Address

Description of Amendment:

a. This is to incorporate the following:

The closing date has been Extended a couple weeks to July 19, 2016

b. All other terms and conditions remain unchanged.

Brodart Co.

Supplier Company Name (**PRINT**)

7/13/16
Date

Lisa Miosi

Authorized Representative Name (**PRINT**)

Director, Customer Care
Title

Lisa Miosi
Authorized Representative Signature



Amendment of Solicitation

Date of Issuance: 06/21/2016

Solicitation No. SW16012

Requisition No. _____

Amendment No. 3

Hour and date specified for receipt of offers is changed: ☒ No ☐ Yes, to: _____ 3:00 PM CST/CDT

Pursuant to OAC 260:115-7-30(d), this document shall serve as official notice of amendment to the Solicitation identified above. Such notice is being provided to all suppliers to which the original solicitation was sent.

Suppliers submitting bids or quotations shall acknowledge receipt of this solicitation amendment prior to the hour and date specified in the solicitation as follows:

- (1) Sign and return a copy of this amendment with the solicitation response being submitted; or,
- (2) If the supplier has already submitted a response, this acknowledgement must be signed and returned prior to the solicitation deadline. All amendment acknowledgements submitted separately shall have the solicitation number and bid opening date printed clearly on the front of the envelope.

ISSUED BY and RETURN TO:

U.S. Postal Delivery or Personal or Common Carrier Delivery:

Office of Management and Enterprise Services
Central Purchasing
5005 N. Lincoln Blvd., Ste. 300
Oklahoma City, OK 73105

Gerald Elrod
Contracting Officer

405 – 522-1037
Phone Number

Gerald.Elrod@omes.ok.gov
E-Mail Address

Description of Amendment:

a. This is to incorporate the following:

The following questions have been received and answered (see below and attached):

Question 1: To clarify, does Item E.3.2. on page 17 of the Solicitation Package refer to one printed binder? Or do you only want the electronic submissions?

Answer 1: Only electronic copies are required.

Question 2: I have a question in regards to the Reference list. If we have a reference listed but do not have a Past Performance Survey is that acceptable or do we have to have both in order for them to be considered a reference?

Answer 2: References that do not include a past performance survey will not be considered.

Question 3: Vendors discount books based on the type of bind/category. The Books Categories on Attachment C, Bid Sheet, include "trade", "general", "scientific". These categories come in multiple binds and are subject to discounts related to those binds (Hardback, Publisher's Library Bind, Hardcover Reinforced, Paperback). Is it acceptable to offer a sliding discount (___% to ___%) and refer to additional discount information that we attach?

Answer 3: The "Notes" section allows for more detailed descriptions of discounts. Attachments are allowed.

Question 4: Will you please confirm that only 2 electronic copies (CDs or flash drives) of our response should be submitted (E.3 page 17) and that no hard paper copies with original signatures are required?

Description of Amendment - continuing

Answer 4: Only electronic copies are required.

Question 5: On form CP004, What should be filled in for "Agency Number"?

Answer 5: The "Agency Number" section can be ignored.

Question 6: On Attachment C, are vendors required to enter a single discount per book category or may a vendor enter a range of discount?

Answer 6: The "Notes" section is to allow for more detailed discount descriptions.

Question 7: Are vendors to submit the proposal only on two flashdrives with nothing on hardcopy?

Answer 7: Only electronic documents on flash drive or disc are required.

Question 8: Will agencies have the flexibility to purchase books that may qualify for coverage under the contract from vendors who are not a party to the agreement?

Answer 8: Unless an exception is provided, agencies must first attempt to find the item they need through vendors on contract.

b. All other terms and conditions remain unchanged.

Brodart Co.

Supplier Company Name (PRINT)

7/13/16

Date

Lisa Miosi

Authorized Representative Name (PRINT)

Director, Customer
Care

Title

Lisa Miosi

Authorized Representative Signature

TABLE OF CONTENTS

A GENERAL PROVISIONS..... 5

B. SPECIAL PROVISIONS10

C. SOLICITATION SPECIFICATIONS.....11

D. EVALUATION16

E. INSTRUCTIONS TO BIDDER16

F. PRICE AND COST17

A. GENERAL PROVISIONS

A.1. Definitions

As used herein, the following terms shall have the following meaning unless the context clearly indicates otherwise:

- A.1.1. "Acquisition" means items, products, materials, supplies, services, and equipment a state agency acquires by purchase, lease purchase, lease with option to purchase, or rental pursuant to the Oklahoma Central Purchasing Act;
- A.1.2. "Bid" means an offer in the form of a bid, proposal, or quote a bidder submits in response to a solicitation;
- A.1.3. "Bidder" means an individual or business entity that submits a bid in response to a solicitation;
- A.1.4. "Solicitation" means a request or invitation by the State Purchasing Director or a state agency for a supplier to submit a priced offer to sell acquisitions to the state. A solicitation may be an invitation to bid, request for proposal, or a request for quotation; and
- A.1.5. "Supplier" or "vendor" means an individual or business entity that sells or desires to sell acquisitions to state agencies.

A.2. Bid Submission

- A.2.1. Submitted bids shall be in strict conformity with the instructions to bidders and shall be submitted with a completed Responding Bidder Information, OMES-FORM-CP-076, and any other forms required by the solicitation.
- A.2.2. Bids shall be submitted to the Central Purchasing Division in a single envelope, package, or container and shall be sealed, unless otherwise detailed in the solicitation. The name and address of the bidder shall be inserted in the upper left corner of the single envelope, package, or container. SOLICITATION NUMBER AND SOLICITATION RESPONSE DUE DATE AND TIME MUST APPEAR ON THE FACE OF THE SINGLE ENVELOPE, PACKAGE, OR CONTAINER.
- A.2.3. The required certification statement, "Certification for Competitive Bid and/or Contract (Non-Collusion Certification)", OMES-FORM-CP-004, must be made out in the name of the bidder and must be properly executed by an authorized person, with full knowledge and acceptance of all its provisions.
- A.2.4. All bids shall be legible and completed in ink or with electronic printer or other similar office equipment. Any corrections to bids shall be identified and initialed in ink by the bidder. Penciled bids and penciled corrections shall NOT be accepted and will be rejected as non-responsive. In addition to a hard copy submittal, the bidder will also be required to submit an electronic copy. Electronic responses must be submitted in the identical format contained in the solicitation (for example Microsoft Word, Microsoft Excel, but not Adobe PDF). In the event the hard copy of the price worksheets and electronic copy of the price worksheets do not agree, the electronic copy will prevail.
- A.2.5. All bids submitted shall be subject to the Oklahoma Central Purchasing Act, Central Purchasing Rules, and other statutory regulations as applicable, these General Provisions, any Special Provisions, solicitation specifications, required certification statement, and all other terms and conditions listed or attached herein—all of which are made part of this solicitation.

A.3. Solicitation Amendments

- A.3.1. If an "Amendment of Solicitation", OMES-FORM-CP-011, is issued, the bidder shall acknowledge receipt of any/all amendment(s) to solicitations by signing and returning the solicitation amendment(s). Amendment acknowledgement(s) may be submitted with the bid or may be forwarded separately. If forwarded separately, amendment acknowledgement(s) must contain the solicitation number and response due date and time on the front of the envelope. The Central Purchasing Division must receive the amendment acknowledgement(s) by the response due date and time specified for receipt of bids for the bid to be deemed responsive. Failure to acknowledge solicitation amendments may be grounds for rejection.
- A.3.2. No oral statement of any person shall modify or otherwise affect the terms, conditions, or specifications stated in the solicitation. All amendments to the solicitation shall be made in writing by the Central Purchasing Division.
- A.3.3. It is the Bidder's responsibility to check the OMES/Central Purchasing Division website frequently for any possible amendments that may be issued. The Central Purchasing Division is not responsible for a bidder's failure to download any amendment documents required to complete a solicitation.

A.4. Bid Change

If the bidder needs to change a bid prior to the solicitation response due date, a new bid shall be submitted to the Central Purchasing Division with the following statement "This bid supersedes the bid previously submitted" in a single envelope, package, or container and shall be sealed, unless otherwise detailed in the solicitation. The name and address of the bidder shall be inserted in the upper left corner of the single envelope, package, or container. SOLICITATION NUMBER AND SOLICITATION RESPONSE DUE DATE AND TIME MUST APPEAR ON THE FACE OF THE SINGLE ENVELOPE, PACKAGE, OR CONTAINER.

A.5. Certification Regarding Debarment, Suspension, and Other Responsibility Matters

By submitting a response to this solicitation:

- A.5.1. The prospective primary participant and any subcontractor certifies to the best of their knowledge and belief, that they and their principals or participants:
 - A.5.1.1. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded by any Federal, State or local department or agency;
 - A.5.1.2. Have not within a three-year period preceding this proposal been convicted of or pled guilty or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or local) contract; or for violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
 - A.5.1.3. Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State, or local) with commission of any of the offenses enumerated in paragraph A.5.1.2. of this certification; and
 - A.5.1.4. Have not within a three-year period preceding this application/proposal had one or more public (Federal, State, or local) contracts terminated for cause or default.
- A.5.2. Where the prospective primary participant is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to its solicitation response.

A.6. Bid Opening

Sealed bids shall be opened by the Central Purchasing Division at 5005 N. Lincoln Blvd. Suite 300, Oklahoma City, Oklahoma, 73105 at the time and date specified in the solicitation as Response Due Date and Time.

A.7. Open Bid / Open Record

Pursuant to the Oklahoma Public Open Records Act, a public bid opening does not make the bid(s) immediately accessible to the public. The procurement or contracting agency shall keep the bid(s) confidential, and provide prompt and reasonable access to the records only after a contract is awarded or the solicitation is cancelled. This practice protects the integrity of the competitive bid process and prevents excessive disruption to the procurement process. The interest of achieving the best value for the State of Oklahoma outweighs the interest of vendors immediately knowing the contents of competitor's bids. [51 O.S. § 24A.5(5)]

Additionally, financial or proprietary information submitted by a bidder may be designated by the Purchasing Director as confidential and the procurement entity may reject all requests to disclose information designated as confidential pursuant to 62 O.S. (2012) § 34.11.1(H)(2) and 74 O.S. (2011) § 85.10. Bidders claiming any portion of their bid as proprietary or confidential must specifically identify what documents or portions of documents they consider confidential and identify applicable law supporting their claim of confidentiality. The State Purchasing Director shall make the final decision as to whether the documentation or information is confidential pursuant to 74 O.S. § 85.10. Otherwise, documents and information a bidder submits as part of or in connection with a bid are public records and subject to disclosure after contract award or the solicitation is cancelled.

A.8. Late Bids

Bids received by the Central Purchasing Division after the response due date and time shall be deemed non-responsive and shall NOT be considered for any resultant award.

A.9. Legal Contract

- A.9.1. Submitted bids are rendered as a legal offer and any bid, when accepted by the Central Purchasing Division, shall constitute a contract.
- A.9.2. The Contract resulting from this solicitation may consist of the following documents in order of preference:
 - A.9.2.1. Purchase order, as amended by Change Order (if applicable);
 - A.9.2.2. Solicitation, as amended (if applicable); and

A.9.2.3. Successful bid (including required certifications), to the extent the bid does not conflict with the requirements of the solicitation or applicable law.

A.9.3. Any contract(s) awarded pursuant to the solicitation shall be legibly written or typed.

A.10. Pricing

A.10.1. Bids shall remain firm for a minimum of sixty (60) days from the solicitation closing date.

A.10.2. Bidders guarantee unit prices to be correct.

A.10.3. In accordance with 74 O.S. §85.40, ALL travel expenses to be incurred by the supplier in performance of the Contract shall be included in the total bid price/contract amount.

A.11. Manufacturers' Name and Approved Equivalents

Unless otherwise specified in the solicitation, manufacturers' names, brand names, information and/or catalog numbers listed in a specification are for information and not intended to limit competition. Bidder may offer any brand for which they are an authorized representative, and which meets or exceeds the specification for any item(s). However, if bids are based on equivalent products, indicate on the bid form the manufacturer's name and number. Bidder shall submit sketches, descriptive literature, and/or complete specifications with their bid. Reference to literature submitted with a previous bid will not satisfy this provision. The bidder shall also explain in detail the reason(s) why the proposed equivalent will meet the specifications and not be considered an exception thereto. Bids that do not comply with these requirements are subject to rejection.

A.12. Clarification of Solicitation

A.12.1. Clarification pertaining to the contents of this solicitation shall be directed in writing to the Central Purchasing Contracting Officer specified in the solicitation, and must be prior to the closing date of the solicitation.

A.12.2. If a bidder fails to notify the State of an error, ambiguity, conflict, discrepancy, omission or other error in the SOLICITATION, known to the bidder, or that reasonably should have been known by the bidder, the bidder shall submit a bid at its own risk; and if awarded the contract, the bidder shall not be entitled to additional compensation, relief, or time, by reason of the error or its later correction. If a bidder takes exception to any requirement or specification contained in the SOLICITATION, these exceptions must be clearly and prominently stated in their response.

A.12.3. Bidders who believe proposal requirements or specifications are unnecessarily restrictive or limit competition may submit a written request for administrative review to the contracting officer listed on the solicitation. This request must be made prior to the closing date of the solicitation.

A.13 Negotiations

A.13.1. In accordance with Title 74 §85.5, the State of Oklahoma reserves the right to negotiate with one, selected, all or none of the vendors responding to this solicitation to obtain the best value for the State. Negotiations could entail discussions on products, services, pricing, contract terminology or any other issue that may mitigate the State's risks. The State shall consider all issues negotiable and not artificially constrained by internal corporate policies. Negotiation may be with one or more vendors, for any and all items in the vendor's offer.

A.13.2. Firms that contend that they lack flexibility because of their corporate policy on a particular negotiation item shall face a significant disadvantage and may not be considered. If such negotiations are conducted, the following conditions shall apply:

A.13.3. Negotiations may be conducted in person, in writing, or by telephone.

A.13.4. Negotiations shall only be conducted with potentially acceptable offers. The State reserves the right to limit negotiations to those offers that received the highest rankings during the initial evaluation phase.

A.13.5. Terms, conditions, prices, methodology, or other features of the bidders offer may be subject to negotiations and subsequent revision. As part of the negotiations, the bidder may be required to submit supporting financial, pricing, and other data in order to allow a detailed evaluation of the feasibility, reasonableness, and acceptability of the offer.

A.13.6. The requirements of the Request for Proposal shall not be negotiable and shall remain unchanged unless the State determines that a change in such requirements is in the best interest of the State Of Oklahoma.

A.14. Rejection of Bid

The State reserves the right to reject any bids that do not comply with the requirements and specifications of the solicitation. A bid may be rejected when the bidder imposes terms or conditions that would modify requirements of the solicitation or limit the bidder's liability to the State. Other possible reasons for rejection of bids are listed in OAC 260:115-7-32.

A.15. Award of Contract

- A.15.1. The State Purchasing Director may award the Contract to more than one bidder by awarding the Contract(s) by item or groups of items, or may award the Contract on an ALL OR NONE basis, whichever is deemed by the State Purchasing Director to be in the best interest of the State of Oklahoma.
- A.15.2. Contract awards will be made to the lowest and best bidder(s) unless the solicitation specifies that best value criteria is being used.
- A.15.3. In order to receive an award or payments from the State of Oklahoma, suppliers must be registered. The vendor registration process can be completed electronically through the OMES website at the following link: <https://www.ok.gov/dcs/vendors/index.php>.

A.16. Contract Modification

- A.16.1. The Contract is issued under the authority of the State Purchasing Director who signs the Contract. The Contract may be modified only through a written Contract Modification, signed by the State Purchasing Director.
- A.16.2. Any change to the Contract, including but not limited to the addition of work or materials, the revision of payment terms, or the substitution of work or materials, directed by a person who is not specifically authorized by the Central Purchasing Division in writing, or made unilaterally by the supplier, is a breach of the Contract. Unless otherwise specified by applicable law or rules, such changes, including unauthorized written Contract Modifications, shall be void and without effect, and the supplier shall not be entitled to any claim under this Contract based on those changes. No oral statement of any person shall modify or otherwise affect the terms, conditions, or specifications stated in the resultant Contract.

A.17. Delivery, Inspection and Acceptance

- A.17.1. Unless otherwise specified in the solicitation or awarding documents, all deliveries shall be F.O.B. Destination. The bidder(s) awarded the Contract shall prepay all packaging, handling, shipping and delivery charges and firm prices quoted in the bid shall include all such charges. All products and/or services to be delivered pursuant to the Contract shall be subject to final inspection and acceptance by the State at destination. "Destination" shall mean delivered to the receiving dock or other point specified in the purchase order. The State assumes no responsibility for goods until accepted by the State at the receiving point in good condition. Title and risk of loss or damage to all items shall be the responsibility of the supplier until accepted by the receiving agency. The supplier(s) awarded the Contract shall be responsible for filing, processing, and collecting any and all damage claims accruing prior to acceptance.
- A.17.2. Supplier(s) awarded the Contract shall be required to deliver products and services as bid on or before the required date. Deviations, substitutions or changes in products and services shall not be made unless expressly authorized in writing by the Central Purchasing Division.

A.18. Invoicing and Payment

- A.18.1. Pursuant to 74 O.S. §85.44(B), invoices will be paid in arrears after products have been delivered or services provided.
- A.18.2. Interest on late payments made by the State of Oklahoma is governed by 62 O.S. §34.71 and 62 O.S. §34.72.

A.19. Tax Exemption

State agency acquisitions are exempt from sales taxes and federal excise taxes. Bidders shall not include these taxes in price quotes.

A.20. Audit and Records Clause

- A.20.1. As used in this clause, "records" includes books, documents, accounting procedures and practices, and other data, regardless of type and regardless of whether such items are in written form, in the form of computer data, or in any other form. In accepting any Contract with the State, the successful bidder(s) agree any pertinent State or Federal agency will have the right to examine and audit all records relevant to execution and performance of the resultant Contract.
- A.20.2. The successful bidder(s) awarded the Contract(s) is required to retain records relative to the Contract for the duration of the Contract and for a period of seven (7) years following completion and/or termination of the Contract. If an audit, litigation, or other action involving such records is started before the end of the seven (7) year period, the records are required to be maintained for two (2) years from the date that all issues arising out of the action are resolved, or until the end of the seven (7) year retention period, whichever is later.

A.21. Non-Appropriation Clause

The terms of any Contract resulting from the solicitation and any Purchase Order issued for multiple years under the Contract are contingent upon sufficient appropriations being made by the Legislature or other appropriate government entity. Notwithstanding any

language to the contrary in the solicitation, purchase order, or any other Contract document, the procuring agency may terminate its obligations under the Contract if sufficient appropriations are not made by the Legislature or other appropriate governing entity to pay amounts due for multiple year agreements. The Requesting (procuring) Agency's decisions as to whether sufficient appropriations are available shall be accepted by the supplier and shall be final and binding.

A.22. Choice of Law

Any claims, disputes, or litigation relating to the solicitation, or the execution, interpretation, performance, or enforcement of the Contract shall be governed by the laws of the State of Oklahoma.

A.23. Choice of Venue

Venue for any action, claim, dispute or litigation relating in any way to the Contract shall be in Oklahoma County, Oklahoma.

A.24. Termination for Cause

- A.24.1. The supplier may terminate the Contract for default or other just cause with a 30-day written request and upon written approval from the Central Purchasing Division. The State may terminate the Contract for default or any other just cause upon a 30-day written notification to the supplier.
- A.24.2. The State may terminate the Contract immediately, without a 30-day written notice to the supplier, when violations are found to be an impediment to the function of an agency and detrimental to its cause, when conditions preclude the 30-day notice, or when the State Purchasing Director determines that an administrative error occurred prior to Contract performance.
- A.24.3. If the Contract is terminated, the State shall be liable only for payment for products and/or services delivered and accepted.

A.25. Termination for Convenience

- A.25.1. The State may terminate the Contract, in whole or in part, for convenience if the State Purchasing Director determines that termination is in the State's best interest. The State Purchasing Director shall terminate the Contract by delivering to the supplier a Notice of Termination for Convenience specifying the terms and effective date of Contract termination. The Contract termination date shall be a minimum of 60 days from the date the Notice of Termination for Convenience is issued by the State Purchasing Director.
- A.25.2. If the Contract is terminated, the State shall be liable only for products and/or services delivered and accepted, and for costs and expenses (exclusive of profit) reasonably incurred prior to the date upon which the Notice of Termination for Convenience was received by the supplier.

A.26. Insurance

The successful bidder(s) awarded the Contract shall obtain and retain insurance, including workers' compensation, automobile insurance, medical malpractice, and general liability, as applicable, or as required by State or Federal law, prior to commencement of any work in connection with the Contract. The supplier awarded the Contract shall timely renew the policies to be carried pursuant to this section throughout the term of the Contract and shall provide the Central Purchasing Division and the procuring agency with evidence of such insurance and renewals.

A.27. Employment Relationship

The Contract does not create an employment relationship. Individuals performing services required by this Contract are not employees of the State of Oklahoma or the procuring agency. The supplier's employees shall not be considered employees of the State of Oklahoma nor of the procuring agency for any purpose, and accordingly shall not be eligible for rights or benefits accruing to state employees.

A.28. Compliance with the Oklahoma Taxpayer and Citizen Protection Act of 2007

By submitting a bid for services, the bidder certifies that they, and any proposed subcontractors, are in compliance with 25 O.S. §1313 and participate in the Status Verification System. The Status Verification System is defined in 25 O.S. §1312 and includes but is not limited to the free Employment Verification Program (E-Verify) through the Department of Homeland Security and available at www.dhs.gov/E-Verify.

A.29. Compliance with Applicable Laws

The products and services supplied under the Contract shall comply with all applicable Federal, State, and local laws, and the supplier shall maintain all applicable licenses and permit requirements.

A.30. Special Provisions

Special Provisions set forth in SECTION B apply with the same force and effect as these General Provisions. However, conflicts or inconsistencies shall be resolved in favor of the Special Provisions.

B. SPECIAL PROVISIONS

B.1. Contract Period

- B.1.1.** The Contract Period is the Date of Award through one year (or enter contract period) with the option to renew for up to four (4) additional one year periods. A written request for renewal will be sent to the Supplier(s) 30 days prior to contract expiration. Suppliers shall express their intention to renew the contract by completing, signing and returning the renewal request to the contract officer.

B.2. Type of Contract.

- B.2.1.** This is a firm fixed price contract for indefinite delivery and indefinite quantity for the supplies/services specified.

B.3. Contract Preference

- B.3.1.** This contract is mandatory for State of Oklahoma agencies

B.4. Authorized Users.

- B.4.1.** This Contract shall be made available to all State Departments, Boards, Commissions, Agencies and Institutions. The Oklahoma Statutes state that Counties, School Districts and Municipalities may avail themselves of the contract subject to the approval of the successful supplier(s). If a supplier wishes to prohibit counties, school districts and municipalities from utilizing this contract, the decision to opt out should be clearly stated in the solicitation response.

B.5. Extension of Contract.

- B.5.1.** The State may extend the term of this contract for up to 90 day intervals if mutually agreed upon by both parties in writing.

B.6. Ordering.

- B.6.1.** Any supplies and/or services to be furnished under this contract shall be ordered by issuance of written purchase orders, or with the State purchase card, by state agencies and authorized entities. There is no limit on the number that may be issued. Delivery to multiple destinations may be required. All orders are subject to the terms and conditions of this contract. Any order dated prior to expiration of this contract shall be performed.

B.7. Gratuities.

- B.7.1.** The right of the successful supplier to perform under this contract may be terminated by written notice if the Contracting Officer determines that the successful supplier, or its agent or another representative offered or gave a gratuity (e.g., an entertainment or gift) to an officer, official or employee of Central Purchasing.

B.8. Proposal Conformity

- B.8.1.** By submitting a response to this solicitation, the supplier attests that the supplies or services conform to specified contract requirements.

B.9. Contract Usage Reporting Requirements

- B.9.1.** Reports shall provide the total dollar amounts sold to all political entities that include but are not limited to State Agencies, Counties, Cities, Schools, hospitals and Municipalities.
- B.9.2.** Reports shall be submitted quarterly regardless of quantity. Failure to report sales may be cause for termination of contract.
- B.9.3.** Usage Reports shall be delivered to Central Purchasing within 45 calendar days upon completion of performance quarter period cited in paragraph "d" of this contract provision. Usage Reports must be delivered to Central Purchasing Strategic Sourcing group at strategic.sourcing@omes.ok.gov.
- B.9.4.** Contract quarterly reporting periods shall be:
- B.9.4.1.** January 1 through March 31
 - B.9.4.2.** April 1 through June 30
 - B.9.4.3.** July 1 through September 30
 - B.9.4.4.** October 1 through December 31
- B.9.5.** Failure to provide usage reports shall result in cancellation or suspension of contract.
- B.9.6.** Usage Reports shall be submitted in the Excel form listed as Attachment "A"

B.10. Contract Management Fee

- B.10.1.** As provided by Oklahoma State Statute 74 O.S. §85.33A, the Office of Management and Enterprise Services assesses a Contract Management Fee in the sum of 1 % on all sales transacted by any entity under this contract.
- B.10.2.** Supplier agrees to annotate the resultant amount on the quarterly "Contract Usage Report" as listed in Section B11.6 and make payment by company check to OMES – Central Purchasing Division within forty five (45) calendar days from the completion of the quarterly reporting period as listed in Section B11.4. To ensure the payment is credited properly, the supplier must identify the check as a "Contract Management Fee" and include the following information with the payment: LIST SW# and Contract Title, the report amount and the reporting period covered. The Contract Management Fee shall be mailed to:
- OMES – Central Accounting and Reporting
5005 N. Lincoln, Suite 200
Oklahoma City, OK 73105
- B.10.3.** Failure to remit the fee quarterly may result in the cancellation of the contract. The State Contract Management Fee is non-refundable when an item is rejected, returned or declined due to the Supplier's failure to perform or comply with specifications or requirements of the contract.

B.11. Clarification of Solicitation

- B.11.1.** Clarification pertaining to the contents of this solicitation shall be directed in writing to the Central Purchasing
- B.11.2.** Contracting Officer specified in the solicitation and must be prior to the closing date of the solicitation.
- B.11.3.** If a bidder fails to notify the State of an error, ambiguity, conflict, discrepancy, omission or other error in the SOLICITATION, known to the bidder, or an error that reasonably should have been known by the bidder, the bidder shall submit a bid at its own risk; and if awarded the contract, the bidder shall not be entitled to additional compensation, relief, or time, by reason of the error or its later correction. If a bidder takes exception to any requirement or specification contained in the SOLICITATION, these exceptions must be clearly and prominently stated in their response.
- B.11.4.** Bidders who believe proposal requirements or specifications are unnecessarily restrictive or limit competition may submit a request for administrative review, in writing, to the Central Purchasing Contracting Officer listed on the solicitation. This request must be made prior to the closing date of the solicitation.

B.12. Minor Deficiencies or Minor Informalities

- B.12.1.** "Minor deficiency" or "minor informality" means an immaterial defect in a bid or variation in a bid from the exact requirements of a solicitation that may be corrected or waived without prejudice to other bidders. A minor deficiency or informality does not affect the price, quantity, quality, delivery or conformance to specifications and is negligible in comparison to the total cost or scope of the acquisition.
- B.12.2.** The State Purchasing Director may waive minor deficiencies or informalities in a bid if the State Purchasing Director determines the deficiencies or informalities do not prejudice the rights of other bidders, or are not a cause for bid rejection.

B.13. Electronic Submission

All submissions should be submitted to Central Purchasing on electronic media in accordance with Section E.3 of the RFP. Submissions will not be accepted via email or hard copy. This term overrides any terms in Section A requiring submission of hard-copy.

C. SOLICITATION SPECIFICATIONS

C.1. Introduction

- C.1.1.** This solicitation constitutes a competitive request for proposal (RFP) to establish a statewide contract for books, periodicals, multi-media and other publications which all State agencies, cities, counties, and other municipalities may utilize. The approximate usage of SW012 in FY15 was \$7,100,000.00.
- C.1.2.** The State intends to establish one or more contracts to satisfy the requirements of products listed. The State may opt to award to one or more respondent(s), or it may award all to one respondent. Respondents are strongly encouraged to submit pricing/proposals on as many products as possible.

C.2. Categories

- C.2.1.** General
- C.2.1.1.** Fiction and nonfiction materials not otherwise covered in the categories listed below.
- C.2.2.** Encyclopedias
- C.2.2.1.** Reference materials, typically arranged alphabetically, giving information on a broad range of subjects.

C.2.3. Legal Publications and Law Books

C.2.3.1. Reference materials of a legal nature including law manuals, code books and statutes, updates and revisions.

C.2.4. Medical Books

C.2.4.1. Medical guides, diagnostic manuals and other medical reference material.

C.2.5. Multi-Media Products and Recorded Publication Materials

C.2.5.1. Audio and video materials including informational videos and audiobooks

C.2.6. Periodical and other Serial Subscriptions

C.2.6.1. Journals, magazines, periodicals and other subscription materials

C.2.7. Reference

C.2.7.1. Reference books not otherwise categorized including dictionaries and general reference materials

C.2.8. Scientific

C.2.8.1. Scientific reference guides, studies and publications

C.2.9. Technical

C.2.9.1. Technical manuals and guides

C.2.10. Textbooks

C.2.10.1. Books for use in classroom settings

C.2.11. Trade Books

C.2.11.1. Trade guides and publications including trade reference guides, professional code manuals and other similar materials.

C.3. Account Management

C.3.1. The respondent must include the name and contact information of the individual who will be the Account Manager for the term of the Contract. The Account Manager will be responsible for operation and administration of the Contract by the Contractor. The Account Manager must respond in a timely manner and in writing unless instructed otherwise, to all information requests from the Contracting Officer.

C.3.2. The Account Manager shall, upon request attend meetings at Central Purchasing or at other sites, as requested and determined by the Contracting Officer. The Account Manager will be responsible for reports required by the contract and to serve as liaison between the Contractor and Central Purchasing and any other eligible participant. The Contracting Officer may require the Contractor to relieve the Account Manager from work on this contract, if in its opinion, it is apparent that the Account Manager does not deliver work that conforms to performance standards outlined in this RFP.

C.3.3. This named Account Manager must be among those present for all scheduled pre-award meetings.

C.4. Purchasing Process and Pricing

C.4.1. Authorized Users will place their own orders with the Contractor. After Contract award, Contractor will interact with Authorized Users on a day-to-day basis for specific issues relating to delivery timeliness, product quality, returns, and similar concerns. The Contracting Officer listed will be responsible for overall contract management, including addendums and Contract performance.

C.4.2. Respondents are requested to provide a discount off of the list price for the categories listed. This discount will be applied to the list price to come up with the Contract Pricing (inclusive of Standard delivery) for products.

C.5. Service Level Requirements and Expectations

Section C.5.1 lists the State's Mandatory Service Level Requirements. Respondents must indicate whether they are able to meet these service level requirements. Respondents that are unable to meet any of these service level requirements shall be eliminated from consideration for an award.

Section C.5.2 lists the State's Desired Service Level Expectations. These expectations are desired by the State and the State will evaluate these responses as part of the technical/qualitative evaluation. Respondents must indicate whether they are able to meet these service level expectations.

Mandatory Service Level Requirements and Desired Service Level Expectations shall be met at no additional cost to the State.

C.5.1. Mandatory Service Level Requirements

This section of the document contains Mandatory Service Level Requirements that the successful respondent is required to meet at

NO extra charge. Respondents who cannot meet Requirements C.5.1.1 through C.5.1.4 shall be qualified on the grounds of non-responsiveness.

- C.5.1.1.** A supplier must have been in business for a minimum of 24 months to be eligible for a contract award.
- C.5.1.2.** For all products sold, Contractor must be an original manufacturer, authorized distributor, or dealer authorized by manufacturer. If requested, Respondent must be able to identify an account number with manufacturers represented.
- C.5.1.3.** Each product sold will have a minimum of manufacturer's standard warranty.
- C.5.1.4.** If any prices fluctuate between the time of order and delivery, Contractor shall charge the prices in effect as of the order date.
- C.5.1.5.** The Contractor will not invoice service fees or additional costs to the Authorized Users during the term of the contract. For instance, there will be no small order, minimum order, special order, shipping (except Rush delivery as specified in the Cost Proposal), hazardous materials, pallet, or fuel charges or surcharges.

C.5.2. Desirable Service Level Expectations

This section of the document contains Desirable Service Level Expectations that the Contractor is expected to perform at NO extra charge. All Mandatory Requirements listed in Section C.5.1 supersede the Desirable Service Level Expectations listed below. Respondents are required to indicate any inability to provide the Desirable Service Level Expectation. In addition, respondents are required to propose alternatives to Desirable Service Level Expectations that cannot be met.

C.5.2.1. Response Time

The Contractor should respond to all communications no later than one business day.

C.5.2.2. Fill Rate

The Contractor should maintain a Fill Rate of 98%. The fill rate will be calculated by each Facility, by dividing the number of line items delivered on time by the number of line items ordered for delivery during that month and multiplying the result by 100 to arrive at the percent (%) fill rate.

C.5.2.3. Invoice Accuracy

The Contractor should strive to achieve invoice accuracy of 100% as measured by SKUs ordered.

C.5.2.4. Delivery Standards

Respondent should make deliveries on dates and times acceptable to Authorized Users. If a regular delivery day falls on a State holiday, Authorized Users and Contractor may determine an alternate date.

The Contractor should deliver the Products by the delivery date specified in any executed Attachment, Appendix, or Order referencing the Agreement. The Contractor should ensure Delivery Date standards are met 97% of the time.

C.5.2.5. Non-Delivery

After notification of impending short or out-of-stock items, Authorized User may cancel balance of incomplete deliveries without penalty. Authorized User may purchase shorted items that cannot be supplied by the Contractor by date required elsewhere.

C.5.2.6. Overall Customer Satisfaction

Contractor should develop a plan to conduct a quarterly survey of end-users to determine the level of customer service satisfaction experienced by Authorized Users, and should conduct such a survey upon request from the Contracting Officer. Both the raw and analyzed survey results should be provided to the Contracting Officer. The following includes some of the areas to be measured on the survey: Responsiveness, Communication, Courtesy, Competence, Effectiveness, and Overall Satisfaction.

C.5.2.7. Ordering Methods

Contractors should have a local Oklahoma telephone number or a toll free (800) number. Each Authorized User will be responsible for placing its own orders, which may be accomplished by written purchase order, telephone, fax or computer on-line systems. The State encourages Contractors to have online ordering capabilities, such as a dedicated State website, to facilitate online orders. In the response, please include screenshots of the relevant web interface.

C.5.2.8. Payment Options

Authorized Users will pay the Contractor by check, electronic funds transfer, or with the State's authorized P-card (credit card).

C.5.2.9. Freight Policy

All shipments should be F.O.B. Destination to the specified location, with inside delivery if requested. Contractor is responsible for filing and expediting all freight claims with the carrier. The Contractor should pay title and risk of loss or damage charges.

C.5.2.10. Rush Delivery

Respondents should be able to provide Rush Delivery to Authorized Users within a 24 hour window. Explain your rush delivery

capabilities in your response.

Emergency/rush delivery requiring special shipping and handling will be at Authorized Users' expense (with prior approval from the Authorized User). Rush delivery that occurs as a result of the Contractor's error will be free of charge.

C.5.2.11. Shipping

The State is committed to recycling and reuse of packaging materials. Some Authorized Users may also require shrink wrapping. Authorized Users will inform Contractor of any such requirements.

All hazardous materials should be shipped per all Federal and State regulations.

All products should be shipped in a manner which will enable the receiving person(s) to easily check the shipment with the invoice.

C.5.2.12. Return of Product

Authorized Users may return to the Contractor at the Contractor's expense any materials delivered in poor condition, in excess of the amount authorized by the requisition form or not included on the requisition form or purchase order within 30 days of delivery. Credit for returned goods shall be made immediately once the Contractor receives the returned goods.

If any product is returned to a Contractor for failure of performance, the Contractor will, at the State's discretion, refund all amounts paid to the Contractor for such product or replace the product, and the following shall apply:

Within twenty (20) days of written notification by the Authorized User, the Contractor should make arrangements for the return of the product.

The Contractor should bear all shipping and insurance costs.

Contractor should be liable for damages to the product, unless caused by fault or negligence of the Authorized User that occur during the return process.

Please describe your return policy in detail.

C.5.2.13. Returns Due to User Error

Contractor should provide for return of unopened items ordered in error for up to 30 calendar days from delivery. For all returns of unopened items or returns due to user error, returns should be provided free-of-charge as long as they occur at a regularly-scheduled delivery time. Otherwise, Authorized Users should be responsible for all costs associated with the preparation of the product for shipping, and all shipping costs to the Contractor's nearest service location for such returns; no additional charges are allowed, including restocking fees.

Respondent should issue a credit to Authorized User's account as soon as items have been received by the Contractor.

C.5.2.14. Post-Order Customer Service

The Contractor should provide to all Authorized Users a single point of contact (and a backup) to handle questions and resolve problems that arise. At least one Customer Service Representative should be available during standard business hours in the Central time zone, regardless of the time zone where Contractor is located. All service representatives should have access to information to provide immediate response to inquiries concerning the status of orders (shipped or pending), delivery information, back-order information, statewide contract pricing, contracted product offerings/exclusions, contract compliance requirements, and general product information. Representatives should be available by email, fax, or phone (local or 800 number).

C.5.2.15. Price Verification

The Contractor should be able to provide manufacturer price lists and its own list price lists at the State's request in order for the State to verify pricing. The Contractor should have its own auditing system to verify that correct pricing is being offered to the State. In addition, the State reserves the right to audit Contractor records in order to identify discrepancies. If discrepancies are found, at a minimum, the Contractor will refund the State the difference and may be subject to other legal remedies.

C.5.2.16. Respondents should offer all rebates and special offers (including commercial and consumer offers) made available by the manufacturer, in addition to contracted pricing.

C.5.2.17. Quality Assurance and Warranty Guarantee

The Contractor should guarantee its products to be free from defects in materials and workmanship, given normal use and care, over a minimum of the manufacturer's warranty period. The Contractor should agree to repair and/or immediately replace without charge (including freight both ways) to Authorized Users any product or part thereof that proves to be defective or fails within the warranty period as specified.

C.5.2.18. Notification of Back Orders

Please describe in detail your back order notification procedures.

C.5.2.19. Receiving Procedures and Order Inspection

State personnel may inspect and verify deliveries. Products may be matched against the packing slip and order specifications. Authorized Users may identify and reconcile delivery discrepancies of quantity or quality after delivery. Product delivered will also be inspected at time of use and is subject to refusal/return for issues of quality.

Any cases damaged during loading or delivery will be rejected. Contractor should replace with like or acceptable product at no charge within two business days of notice.

When receiving deliveries, Authorized Users may:

Inspect each item at the time of receipt

Note any count discrepancies and visible damage on the Contractor's packing slip. Discrepancies or damages noted should be initialed by the Contractor's delivery agent

If, upon inspection at the time of receipt, products are found to be in unacceptable condition, Authorized User may refuse delivery and note reason on delivery receipt. Contractor's delivery agent shall initial any such notes

When satisfied that the shipment is in proper order and/or all discrepancies have been properly noted and initialed, the receiving person shall sign the Contractor's packing slip and retain a copy for their records

Authorized Users reserve the right to reject all or part of a delivery

Contractor should allow ample time for these procedures at each delivery location.

C.5.2.20. Invoice Requirements

All invoices should reflect the prices and discounts established for the items on this contract for all orders placed by Authorized Users.

Before payment is made, the State will verify that all invoiced charges are correct as per the Contract(s). Only properly submitted invoices will be officially processed for payment. Prompt payment requires that your invoices be accurate, clear and complete in conformity with the instructions below. All invoices must be itemized showing:

- Contractor name
- Remit to address
- Purchase order number (or purchase method and user name, if there is no purchase order)
- Invoice Number
- Date of order/ release
- Item manufacturer's name or abbreviation (if applicable)
- Complete item description
- Unit of measure
- Quantity per UOM
- Manufacturer's product number
- Contractor's catalog and/or stock numbers
- Contract price
- Quantity shipped
- Extended prices
- Shipping charges (if applicable)
- Discounts
- Agency Name
- Purchaser name
- Account number
- Invoice total

Respondent should provide original invoice and requested number of copies to the designated accounts payable representative(s) or addresses for each Authorized User.

Each invoice should contain only those products covered by the purchase order or other purchase method designated on that invoice. Invoices that have pricing other than approved contract pricing will not be considered valid invoices.

C.5.2.21. Complaint Resolution Procedure

The Contractor should have a robust complaint resolution procedure. Please describe in detail.

C.5.2.22. Catalogs

Contractor should have web based catalog(s) and deliver hard copies, CD-ROM, or electronic media copies of the most current catalog to each Authorized User upon request. Contractor should provide Contracting Officer with an electronic copy of its most

recent catalog within five (5) business days of publication. The most recent catalog must be included with a Supplier's response to the RFP.

D. EVALUATION

D.1. Method of Evaluation

- D.1.1.** The State will award the contract to the respondent(s) whose offer is determined to be of the Best Value to the State.
- D.1.2.** The evaluation and selection of a Contractor will be based on the information submitted in a Proposal. Failure to respond to each of the requirements in the RFP may be the basis for rejecting a response.

D.2. Best Value Criteria

- D.2.1.** The State intends to award to ~~one~~ multiple Suppliers as a result of this Request for Proposal (RFP). Said contract will be awarded to the responsible Supplier(s) whose response, conforming to the RFP, is deemed best value.
- D.2.2.** Upon receipt of all responses, each response will be evaluated to determine which Suppliers meet all minimum mandatory pre-requisites as set forth in Section C.5.1. Mandatory Supplier Qualifications. Those proposals which met the minimum mandatory pre-requisites will enter the technical phase of evaluation. Proposals which do not meet the minimum mandatory pre-requisites will be deemed non-responsive at this point and will receive no further consideration.
- D.2.3.** An evaluation team will conduct evaluation of responses and prices received in response to this solicitation according to these criteria:
 - D.2.3.1.** past experience and performance
 - D.2.3.2.** organizational capacity and resources
 - D.2.3.3.** technical proposal
 - D.2.3.4.** cost

D.3. Competitive Negotiations of Proposals

In accordance with Oklahoma Statutes, 74 O.S. § 85.5, the State of Oklahoma reserves the right to negotiate with one, selected, all or none of the Bidders responding to this solicitation to obtain the best value for the State. Negotiations could entail discussions on products, services, pricing, contract terminology or any other issue that mitigate the State's risks. The State will consider all issues negotiable and not artificially constrained by internal corporate policies. Negotiation may be with one or more Bidders, for any and all items in the Bidder's proposal.

Firms that contend that they lack flexibility because of their corporate policy on a particular negotiation item will face a significant disadvantage and may not be considered. If such negotiations are conducted, the following conditions shall apply:

- D.3.1.** Negotiations may be conducted in person, in writing, or by telephone.
- D.3.2.** Negotiations will only be conducted with potentially acceptable proposals. The State reserves the right to limit negotiations to those proposals that received the highest rankings during the initial evaluation phase.
- D.3.3.** Terms, conditions, prices, methodology, or other features of the Bidder's proposal may be subject to negotiations and subsequent revision. As part of the negotiations, the Bidder may be required to submit supporting financial, pricing, and other data in order to allow a detailed evaluation of the feasibility, reasonableness, and acceptability of the proposal.
- D.3.4.** The mandatory requirements of the Request for Proposal shall not be negotiable and shall remain unchanged unless the State determines that a change in such requirements is in the best interest of the State Of Oklahoma.
- D.3.5.** BEST and FINAL – The state may request best and final offers if deemed necessary, and will determine the scope and subject of any best and final request. However, the Bidder should not expect that the state will ask for best and finals to give the Bidder an opportunity to strengthen your proposal. Therefore, the Bidder must submit your best offer based on the terms and condition set forth in this solicitation.

E. INSTRUCTIONS TO BIDDER

E.1. Introduction

Prospective Bidders are urged to read this solicitation carefully. Failure to do so will be at the Bidder's risk. Provisions, terms, and conditions may be stated or phrased differently than in previous solicitations. Irrespective of past interpretations, practices or customs, proposals will be evaluated and any resultant contract(s) will be administered in strict accordance with the plain meaning of the contents hereof. The Bidder is cautioned that the requirements of this solicitation can be altered only by written amendment approved by the state and that verbal communications from whatever source are of no effect. In no event shall the Bidder's failure to read and understand any term or condition in this solicitation constitute grounds for a claim after contract award.

E.1.1. MANDATORY AND NON-MANDATORY TERMS

E.1.1.1. Whenever the terms “shall”, “must”, “will”, or “is required” are used in this RFP, the specification being referred to is a mandatory specification of this RFP. Failure to meet any mandatory specification may cause rejection of the Bidder’s Proposal.

E.1.1.2. Whenever the terms “can”, “may”, or “should” are used in this RFP, the specification being referred to is a desirable item and failure to provide any item so termed will not be cause for rejection.

E.2. Technical Questions

Technical questions concerning the RFP should be submitted in writing to the contracting officer listed on the front page of the solicitation no later than June 17th, 2016 at 3:00PM.

E.3. RFP Submission Requirements

E.3.1. Supplier should submit two (2) CDs, DVDs or Flash Drives containing an electronic copy of the proposal which must be clearly marked with the Supplier’s name, solicitation number and date of solicitation closing.

E.3.1.1. All electronic documents must be in one of the following software formats:

E.3.1.1.1. MS Word (.doc or .docx), MS Excel (.xls or .xlsx), or Adobe PDF (.pdf)

E.3.1.1.2. Graphic samples must be in tif, gif, jpeg or pdf

E.3.2. Each Supplier shall submit a complete proposal, and should clearly describe Supplier’s ability to meet or exceed every requirement detailed in the Solicitation Request and this RFP. Responses should be organized and numbered in a manner consistent with the RFP (C.4.2.1, C.4.2.2, etc...).

E.3.3. Each Supplier shall submit the required forms in the front of the Solicitation Packet.

E.3.3.1. OMES-FORM-CP-076

E.3.3.2. OMES-FORM-CP-004

E.4. Solicitation Submission

Suppliers should submit the following components to ensure a complete response will be evaluated.

E.4.1. Past Performance Information

E.4.1.1. A list of references (minimum of five) who have utilized the Offeror’s services in a like manner (services similar in size and scope of this RFP). Please refer to Attachment B for complete instructions. A form to be forwarded to the references (past clients) is provided in that attachment. These forms must be filled out and included with your proposal response.

E.4.2. Organizational Capacity

E.4.2.1. A statement concerning the length of time in business, the number of employees, the financial condition, ownership, location and total number of clients served. A detailed listing of products offered. This may be via company’s online website, or by an electronic catalog. All products shall list the manufacturer name.

E.4.3. Technical Proposal

E.4.3.1. Complete response to Section C of the RFP.

E.4.3.2. Electronic copy of a Supplier’s current catalogue in accordance with C.5.2.22 of the RFP.

E.4.4. Price Response

E.4.4.1. Complete response to Attachment C Bid Sheet.

E.5. Anticipated Timeline

RFP Milestones	Estimated Completion Dates
RFP Issue Date	June 7, 2016
Deadline for Questions Submission	June 17, 2016
Responses to RFP Due	July 5, 2016

F. PRICE AND COST

All Suppliers must include Attachment C – Bid Sheet in their response to the RFP. The % discount off of list for each contract year

should be included for all categories being bid. Additional comments and bulk discount options should be included in the space provided.

State of Oklahoma
SW 012 – Books & Publications Attachment B:
Past Performance Information

Past Performance Information

Preparing the Surveys

1. Each respondent is responsible for sending out a survey questionnaire to past and/or current clients. The survey questionnaire is provided in this document.
2. Each respondent should provide at least five (5) but no more than ten (10) completed surveys.
3. All returned surveys MUST be evaluated and signed by the past client. If a survey is not signed, it will NOT be counted.
4. The client must sign the survey form to prove that they completed the survey.
5. All of the returned surveys will be included with the response submittal, .by the date scheduled on the solicitation. The scores of the submitted surveys will be used to compile the average Past Performance Information rating for the responding company.
6. The State may contact the reference for additional information or to clarify survey data. If the reference cannot be contacted, the survey will be deleted and no credit given for that reference.

Creating and Submitting a Reference List

1. The “Reference List” must be submitted with response.
2. The Reference List must include the following. If you do not submit all the information required, there will be no credit given for the reference):

CODE	A unique (different) number assigned to each project
FIRST NAME	First name of the person who will answer customer satisfaction questions.
LAST NAME	Last name of the person who will answer customer satisfaction questions.
PHONE NUMBER	Current phone number for the reference (including area code).
FAX NUMBER	Current fax number for the reference (including area code).
CLIENT NAME	Name of the company or institution that the work was performed for (i.e. Cactus School District, Rock Industries, and City of Austin).
CITY	Location of project
STATE	Location of project
ZIP CODE	Location of project
Duration of Service	Date started to Date finished (example: 5/1/2001 to present)

3. The vendor is responsible for verifying that their information is accurate prior to submission.

REFERENCE LISTING

Code	FIRST NAME	LAST NAME	PHONE	FAX	COMPANY	CITY	STATE	DURATION
101	Jan	Cole	580.255.0636	580.255.6136	Duncan Public Library,	Duncan	OK	1999 to present
102	Teresa	Labbe	918.623.1915	918.623.0489	Okemah Public Library,	Okemah	OK	1999 to present
103	Jennifer	Marshall	405.801.4586	405.701.2648	Pioneer Library System,	Norman	OK	1999 to present
104	Susan	Rice	918.825.3904	918.825.3914	Pryor Public Schools,	Pryor	OK	1991 to present
105	Mary	Shaklee	580.616.7190	580.249.9280	Enid Public Library,	Enid	OK	2008 to present
106	Megan	Hill	580.628.3366	580.628.3688	Tonkawa Public Library,	Tonkawa	OK	Jan 2016 to present
107	Judy	Tirey	405.522.3317	405.525.7804	Oklahoma Dept. of Libraries,	Oklahoma City	OK	2008 to present
108								
109								
110								
111								
112								
113								
114								
115								

Survey Questionnaire – State of Oklahoma

To: Jan Cole
(Name of person completing survey)

Phone: 580-255-0636 Fax: 580-255-6136

Subject: Past Performance Survey of: Bradart
(Name of Vendor)

The State of Oklahoma is implementing a process that collects past performance information on firms and their key personnel. The information will be used to assist the State in the selection of firms to perform various services. The firm/individual listed above has listed you as a client for which they have previously performed work for. We would appreciate your taking the time to complete this survey.

Rate each of the criteria on a scale of 1 to 10, with 10 representing that you were very satisfied (and would hire the firm/individual again) and 1 representing that you were very unsatisfied (and would never hire the firm/individual again). Please rate each of the criteria to the best of your knowledge. If you do not have sufficient knowledge of past performance in a particular area, leave it blank.

Client Name: Duncan Public Library

Project Name: Ordering / Processing Books
Oklahoma State Contract #SW012

Completion

Date: June, 2016

Past Performance Survey of:

(Name of Vendor)

NO	CRITERIA	Scale	Score
1	Ability to provide a wide selection of products.	(1-10)	10
2	Ability to maintain schedule (delivery as scheduled, or quoted)	(1-10)	10
3	Quality of products offered.	(1-10)	10
4	Professionalism and ability to manage (includes customer service, response time, returns phone calls , emails)	(1-10)	10
5	Accounts Receivable/ Invoice Operations	(1-10)	9
6	Communication, (includes explanation of products available, offers suggestions, cross reference abilities)	(1-10)	10
7	Return Policies	(1-10)	10
8	Overall customer satisfaction and comfort level in hiring vendor again	(1-10)	10

Jan Cole	Jan Cole
Printed Name (of Evaluator)	Signature (of Evaluator)

Thank you for your time and effort in assisting the State of Oklahoma in this important endeavor.

Please list any additional comments you may have in the space provided below.

Brodar has excellent products and their customer
service is great. They are a shade more expensive
than other vendors

Survey Questionnaire – State of Oklahoma

To: Teresa m. Labbe - Okemah Public Library
(Name of person completing survey)

Phone: (918) 623-1915 Fax: (918) 623-0489

Subject: Past Performance Survey of: Budart
(Name of Vendor)

The State of Oklahoma is implementing a process that collects past performance information on firms and their key personnel. The information will be used to assist the State in the selection of firms to perform various services. The firm/individual listed above has listed you as a client for which they have previously performed work for. We would appreciate your taking the time to complete this survey.

Rate each of the criteria on a scale of 1 to 10, with 10 representing that you were very satisfied (and would hire the firm/individual again) and 1 representing that you were very unsatisfied (and would never hire the firm/individual again). Please rate each of the criteria to the best of your knowledge. If you do not have sufficient knowledge of past performance in a particular area, leave it blank.

Client Name: Okemah Public Library Completion

Project Name: Ongoing orders using Oklahoma State Contract #SW012 Date: 6/21/16

Past Performance Survey of:

Brodart

(Name of Vendor)

NO	CRITERIA	Scale	Score
1	Ability to provide a wide selection of products.	(1-10)	8
2	Ability to maintain schedule (delivery as scheduled, or quoted)	(1-10)	9
3	Quality of products offered.	(1-10)	9
4	Professionalism and ability to manage (includes customer service, response time, returns phone calls , emails)	(1-10)	8
5	Accounts Receivable/ Invoice Operations	(1-10)	8
6	Communication, (includes explanation of products available, offers suggestions, cross reference abilities)	(1-10)	8
7	Return Policies	(1-10)	8
8	Overall customer satisfaction and comfort level in hiring vendor again	(1-10)	10

<u>Teresa M. Laster</u>	<u>Lisa M. Laster</u>
Printed Name (of Evaluator)	Signature (of Evaluator)

Thank you for your time and effort in assisting the State of Oklahoma in this important endeavor.

Please list any additional comments you may have in the space provided below.

I order books (exclusively w/ Brodart) and supplies
and have never had any concerns and/or problems.

Survey Questionnaire – State of Oklahoma

To:

Jennifer Marshall

(Name of person completing survey)

Phone:

405-801-4586

Fax:

405-701-2648

Subject: Past Performance Survey of:

Brodart

(Name of Vendor)

The State of Oklahoma is implementing a process that collects past performance information on firms and their key personnel. The information will be used to assist the State in the selection of firms to perform various services. The firm/individual listed above has listed you as a client for which they have previously performed work for. We would appreciate your taking the time to complete this survey.

Rate each of the criteria on a scale of 1 to 10, with 10 representing that you were very satisfied (and would hire the firm/individual again) and 1 representing that you were very unsatisfied (and would never hire the firm/individual again). Please rate each of the criteria to the best of your knowledge. If you do not have sufficient knowledge of past performance in a particular area, leave it blank.

Client Name: Pioneer Library System

Completion

Project Name: Ongoing orders using Oklahoma State Contract #SW012

Date: 6/21/16

Past Performance Survey of:

Brodart

(Name of Vendor)

NO	CRITERIA	Scale	Score
1	Ability to provide a wide selection of products.	(1-10)	9
2	Ability to maintain schedule (delivery as scheduled, or quoted)	(1-10)	9
3	Quality of products offered.	(1-10)	10
4	Professionalism and ability to manage (includes customer service, response time, returns phone calls , emails)	(1-10)	10
5	Accounts Receivable/ Invoice Operations	(1-10)	10
6	Communication, (includes explanation of products available, offers suggestions, cross reference abilities)	(1-10)	10
7	Return Policies	(1-10)	10
8	Overall customer satisfaction and comfort level in hiring vendor again	(1-10)	10

Jennifer Marshall	Juif Marshall
Printed Name (of Evaluator)	Signature (of Evaluator)

Thank you for your time and effort in assisting the State of Oklahoma in this important endeavor.

Please list any additional comments you may have in the space provided below.

Survey Questionnaire – State of Oklahoma

To:

Susan Rice

(Name of person completing survey)

Phone:

918-825-353904

Fax:

918-825-3914

Subject: Past Performance Survey of:

Brodart

(Name of Vendor)

The State of Oklahoma is implementing a process that collects past performance information on firms and their key personnel. The information will be used to assist the State in the selection of firms to perform various services. The firm/individual listed above has listed you as a client for which they have previously performed work for. We would appreciate your taking the time to complete this survey.

Rate each of the criteria on a scale of 1 to 10, with 10 representing that you were very satisfied (and would hire the firm/individual again) and 1 representing that you were very unsatisfied (and would never hire the firm/individual again). Please rate each of the criteria to the best of your knowledge. If you do not have sufficient knowledge of past performance in a particular area, leave it blank.

Client Name:

Pryor Public Schools

Completion

Project Name:

Ongoing orders using Oklahoma State Contract #SW012

Date:


6/22/16

Past Performance Survey of:

Bro - Dart

(Name of Vendor)

NO	CRITERIA	Scale	Score
1	Ability to provide a wide selection of products.	(1-10)	10
2	Ability to maintain schedule (delivery as scheduled, or quoted)	(1-10)	9
3	Quality of products offered.	(1-10)	9
4	Professionalism and ability to manage (includes customer service, response time, returns phone calls , emails)	(1-10)	10
5	Accounts Receivable/ Invoice Operations	(1-10)	8
6	Communication, (includes explanation of products available, offers suggestions, cross reference abilities)	(1-10)	9
7	Return Policies	(1-10)	
8	Overall customer satisfaction and comfort level in hiring vendor again	(1-10)	10

Susan K. Rice	
Printed Name (of Evaluator)	Signature (of Evaluator)

Thank you for your time and effort in assisting the State of Oklahoma in this important endeavor.

Please list any additional comments you may have in the space provided below.

Survey Questionnaire – State of Oklahoma

To: Mary Shaldee
(Name of person completing survey)

Phone: 580-616-7190 Fax: 580-249-9280

Subject: Past Performance Survey of: Brodart
(Name of Vendor)

The State of Oklahoma is implementing a process that collects past performance information on firms and their key personnel. The information will be used to assist the State in the selection of firms to perform various services. The firm/individual listed above has listed you as a client for which they have previously performed work for. We would appreciate your taking the time to complete this survey.

Rate each of the criteria on a scale of 1 to 10, with 10 representing that you were very satisfied (and would hire the firm/individual again) and 1 representing that you were very unsatisfied (and would never hire the firm/individual again). Please rate each of the criteria to the best of your knowledge. If you do not have sufficient knowledge of past performance in a particular area, leave it blank.

Client Name: Enid Public Library

Project Name: Ongoing book orders

Oklahoma State Contract #SW012

Completion

Date: 6-22-16

Past Performance Survey of:

Brodart

(Name of Vendor)

NO	CRITERIA	Scale	Score
1	Ability to provide a wide selection of products.	(1-10)	10
2	Ability to maintain schedule (delivery as scheduled, or quoted)	(1-10)	10
3	Quality of products offered.	(1-10)	10
4	Professionalism and ability to manage (includes customer service, response time, returns phone calls , emails)	(1-10)	9
5	Accounts Receivable/ Invoice Operations	(1-10)	10
6	Communication, (includes explanation of products available, offers suggestions, cross reference abilities)	(1-10)	10
7	Return Policies	(1-10)	10
8	Overall customer satisfaction and comfort level in hiring vendor again	(1-10)	10

Mary Shaklee	Mary M. Shaklee
Printed Name (of Evaluator)	Signature (of Evaluator)

Thank you for your time and effort in assisting the State of Oklahoma in this important endeavor.

Please list any additional comments you may have in the space provided below.

Survey Questionnaire – State of Oklahoma

To: Megan Hill, Library Director
(Name of person completing survey)

Phone: (580) 628-3366 Fax: (580) 628-3688

Subject: Past Performance Survey of: Brodart
(Name of Vendor)

The State of Oklahoma is implementing a process that collects past performance information on firms and their key personnel. The information will be used to assist the State in the selection of firms to perform various services. The firm/individual listed above has listed you as a client for which they have previously performed work for. We would appreciate your taking the time to complete this survey.

Rate each of the criteria on a scale of 1 to 10, with 10 representing that you were very satisfied (and would hire the firm/individual again) and 1 representing that you were very unsatisfied (and would never hire the firm/individual again).

Please rate each of the criteria to the best of your knowledge. If you do not have sufficient knowledge of past performance in a particular area, leave it blank.

Client Name: Tonkawa Public Library Completion

Project Name: Ongoing orders using Oklahoma State Contract #SW012 Date: 6/21/16

Past Performance Survey of:

Brodart

(Name of Vendor)

NO	CRITERIA	Scale	Score
1	Ability to provide a wide selection of products.	(1-10)	10
2	Ability to maintain schedule (delivery as scheduled, or quoted)	(1-10)	8
3	Quality of products offered.	(1-10)	10
4	Professionalism and ability to manage (includes customer service, response time, returns phone calls , emails)	(1-10)	10
5	Accounts Receivable/ Invoice Operations	(1-10)	10
6	Communication, (includes explanation of products available, offers suggestions, cross reference abilities)	(1-10)	10
7	Return Policies	(1-10)	10
8	Overall customer satisfaction and comfort level in hiring vendor again	(1-10)	10

Megan Hill		Megan Hill
Printed Name (of Evaluator)		Signature (of Evaluator)

Thank you for your time and effort in assisting the State of Oklahoma in this important endeavor.

Please list any additional comments you may have in the space provided below.

Love doing business with Brodart!

Survey Questionnaire – State of Oklahoma

To: Judy Tirey*(Name of person completing*survey) Phone: 405-522-3317

Fax: _____

Subject: Past Performance Survey of: Brodart*(Name of Vendor)*

The State of Oklahoma is implementing a process that collects past performance information on firms and their key personnel. The information will be used to assist the State in the selection of firms to perform various services. The firm/individual listed above has listed you as a client for which they have previously performed work for. We would appreciate your taking the time to complete this survey.

Rate each of the criteria on a scale of 1 to 10, with 10 representing that you were very satisfied (and would hire the firm/individual again) and 1 representing that you were very unsatisfied (and would never hire the firm/individual again).

Please rate each of the criteria to the best of your knowledge. If you do not have sufficient knowledge of past performance in a particular area, leave it blank.

Client Name: Oklahoma Department of Libraries

Completion

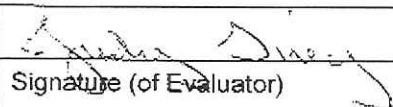
Project Name: Ongoing orders using Oklahoma State Contract #SW012Date: June 21, 2016

Past Performance Survey of:

Brodart

(Name of Vendor)

NO	CRITERIA	Scale	Score
1	Ability to provide a wide selection of products.	(1-10)	10
2	Ability to maintain schedule (delivery as scheduled, or quoted)	(1-10)	10
3	Quality of products offered.	(1-10)	10
4	Professionalism and ability to manage (includes customer service, response time, returns phone calls , emails)	(1-10)	10
5	Accounts Receivable/ Invoice Operations	(1-10)	10
6	Communication, (includes explanation of products available, offers suggestions, cross reference abilities)	(1-10)	10
7	Return Policies	(1-10)	10
8	Overall customer satisfaction and comfort level in hiring vendor again	(1-10)	10

Judy Tirey		
Printed Name (of Evaluator)		Signature (of Evaluator)

Thank you for your time and effort in assisting the State of Oklahoma in this important endeavor.

Please list any additional comments you may have in the space provided below.

One of the best customer service departments I have ever worked with.

ATTACHMENT C - BID SHEET

Vendor Name:

Brodart Co.

BOOKS CATEGORIES	Responding (Yes/No)	% Discount off List	Additional Comments/Bulk Discounts/Prompt Payment Discounts
GENERAL, DOMESTIC	Yes	up to 46%	Please see Attachment B, Pricing Proposal, for the discount applicable to each possible bind/category.
ENCYCLOPEDIA, DOMESTIC	No		
LEGAL PUBLICATIONS, LAW BOOKS, DOMESTIC	Yes	up to 12.0%	Please see Attachment B, Pricing Proposal, for the discount applicable to each possible bind/category.
MEDICAL BOOKS, DOMESTIC	Yes	up to 12.0%	Please see Attachment B, Pricing Proposal, for the discount applicable to each possible bind/category.
MULTI-MEDIA PRODUCTS, RECORDED PUBLICATION MATERIALS	No		
PERIODICAL AND OTHER SERIAL SUBSCRIPTIONS, DOMESTIC	Yes	up to 40.0%	Please see Attachment B, Pricing Proposal, for discount applicable to each possible bind/category. Discounts offered apply to Brodart's Continuations services.
REFERENCE, DOMESTIC	Yes	up to 12.0%	Please see Attachment B, Pricing Proposal, for the discount applicable to each possible bind/category.
SCIENTIFIC, DOMESTIC	Yes	up to 12.0%	Please see Attachment B, Pricing Proposal, for the discount applicable to each possible bind/category.
TECHNICAL, DOMESTIC	Yes	up to 12.0%	Please see Attachment B, Pricing Proposal, for the discount applicable to each possible bind/category.
TEXTBOOKS, DOMESTIC	Yes	up to 12.0%	Please see Attachment B, Pricing Proposal, for the discount applicable to each possible bind/category.
TRADE BOOKS, DOMESTIC	Yes	up to 46.0%	Please see Attachment B, Pricing Proposal, for the discount applicable to each possible bind/category.

Who We Are

Brodart prides itself on providing innovative solutions to the library marketplace. Since 1939 libraries have been able to turn to Brodart for everything from shelf-ready books to electronic ordering systems, high quality furniture, and supplies. From humble beginnings, Brodart has grown to become an international company, serving thousands of libraries from the Northwest Territories to the Pacific Rim. Brodart truly has evolved into a full-service library supply company.

Brodart Books & Library Services is a division of Brodart Co. Brodart Co. is a general partnership, organized in the State of New York, which has two partners, one is itself a limited partnership (Brojo) and the other is a corporation (Nubro, Inc.) Both are predominantly owned by individuals in Brodart management. Nubro Inc. is the managing general partner of Brodart Co. Our company has been in the library business for over seventy-five years and has grown to be a strong, financially stable organization. Our warehouse and corporate offices are located at 500 Arch Street, Williamsport, PA 17701. All materials are cataloged, processed and shipped from this location.

Brodart is a customer-centric company that employs state-of-the-art technology to engineer the technological platform used to support the library community, both in online ordering tools and interfacing with integrated library systems. Brodart utilizes enterprise-class business applications such as Oracle E-Business suite integrated with fully redundant and scalable clustered database systems. We employ a Customer Relationship Management (CRM) system to track and manage customer interactions and incidents to provide quality support. In addition, Brodart has invested in state-of-the-art Intrusion Prevention (IPS) and Security Information Management Systems (SIMS) as well as developed a comprehensive and aggressive network security policy framework.

While one of the world's largest suppliers of books to libraries, we also offer the library marketplace a wide range of products and services. Our core services include customized cataloging, specialty physical processing, collection development tools, electronic ordering and book fulfillment. A true library services company, Brodart's primary business focus is libraries, serving schools, public systems, universities, and the federal government. We do not supply books and materials to the retail market.

Since 1987, Brodart has provided many public libraries with specialized Collection Development Services for both ongoing and opening day collection needs. Many of our Collection Development Services such as: TIPS®(profiled selection lists), FASTips® (standing orders), Collection Builder® (customized selection lists) and vendor selection services are industry leaders.

Our online collection development and ordering tool, Bibz, is available to all customers. Bibz was designed by librarians for librarians and offers flexibility in searching, selection, list building and ordering. All titles, catalogs and selection lists Brodart offers are available through Bibz (please see item C.5.2.22. for access information to view items offered in catalog.).

We offer a number of methods for submitting orders (phone, fax, e-mail, electronically, etc.) and provide various reports for tracking the status of orders. Our system of interfaces seamlessly connects with all major integrated library systems, for all your collection development, acquisitions, cataloging and item record requirements. Our policy is to catalog, process and ship books immediately upon receipt from the publisher. Our delivery, backorder, and cancellation schedules can be customized to accommodate each library's specifications.

Brodart provides a comprehensive range of library books to meet the State of Oklahoma's needs. Our inventory includes new releases and retrospective titles for adult and children, research and technical materials, large print and small press titles. Because we have all our resources centralized in one location we can efficiently and effectively process, fill and ship orders. Our state-of-the-art fulfillment system ensures rapid turnaround time for all back-ordered titles.

Brodart is the industry pioneer of cataloging and processing services. We introduced commercial cataloging and processing services for libraries in 1958, branching into customized cataloging and processing service in 1985. To complement this wide range of services, we have recently introduced our new Flex Cataloging and Processing Services. Once you select your titles, we catalog and process your materials to reflect your detailed specifications. We specialize in serving all of your cataloging and processing needs from the basics to the most complex customized specifications.

Brodart currently employs approximately 464 individuals. We offer a dedicated team of customer care associates, account managers, project managers, information technology, collection development, cataloging and acquisitions specialists, all who provide top-quality customer support. They are experts in their fields and in serving large and small public libraries across the country. Brodart's long and successful history has built countless partnerships with libraries and enabled us to provide the most experienced workforce in the industry.

C. SOLICITATION SPECIFICATIONS

C.1. Introduction

C.1.1. Brodart can comply with this requirement.

C.1.2. Brodart can comply with this requirement.

C.2. Categories

C.2.1. General

C.2.1.1. Brodart is bidding on the General category.

C.2.2. Encyclopedias

C.2.2.1. Brodart is not bidding on Encyclopedias category.

C.2.3. Legal Publications and Law Books

C.2.3.1. Brodart is bidding on the Legal Publications and Law Books category.

C.2.4. Medical Books

C.2.4.1. Brodart is bidding on the Medical Books category.

C.2.5. Multi-Media Products and Recorded Publication Materials

C.2.5.1. Brodart is not bidding on the Multi-Media Products and Recorded Publication Materials category.

C.2.6. Periodical and other Serial Subscriptions

C.2.6.1. Brodart is bidding on the Periodical and other Serial Subscriptions category.

C.2.7 Reference

C.2.7.1. Brodart is bidding on the Reference category.

C.2.8. Scientific

C.2.8.1. Brodart is bidding on the Scientific category.

C.2.9. Technical

C.2.9.1. Brodart is bidding on the Technical category.

C.2.10. Textbooks

C.2.10.1. Brodart is bidding on the Textbooks category.

C.2.11. Trade Books

C.2.11.1. Brodart is bidding on the Trade Books category.

C.3. Account Management

C.3.1. Sales Manager, Jason Goodson, will be available to handle any contract or account issues as well as assist in situations best served by a personal visit. You can reach Jason by calling 800.233.8467, ext.6312 or e-mailing Jason.Goodson@brodart.com. Jason is available at your convenience Central Standard Time. All Brodart representatives respond to all inquiries within one business day.

C.3.2. Brodart can comply with this requirement.

C.3.3. Brodart can comply with this requirement.

C.4. Purchase Process and Pricing

C.4.1 Brodart can comply with this requirement.

C.4.2. Brodart can comply with this requirement.

C.5. Service Level Requirements and Expectations

C.5.1. Mandatory Service Level Requirements

C.5.1.1. Brodart has been in business since 1939.

C.5.1.2. Brodart can comply with this requirement.

C.5.1.3. Brodart can comply with this requirement.

C.5.1.4. Brodart can comply with this requirement.

C.5.1.5. Brodart can comply with this requirement.

C.5.2. Desirable Service Level Expectations

C.5.2.1. All Brodart representatives respond to inquiries within one business day.

C.5.2.2. Brodart provides a comprehensive range of library books to meet the State of Oklahoma's needs. Brodart stocks items according to library needs. In the case that an item is not in Brodart's inventory, it can be identified when utilizing Bibz[®], our online collection development and ordering tool. Our order fulfillment system places orders with all publishers on a daily basis via FTP or fax. In order to provide the fastest possible service to our libraries, we do not require minimum order quantities and we do not accumulate customer orders to meet a minimum order quantity. This policy allows us to fill 85% of all customer backorders in 3 weeks, with overall fill rates of greater than 98% of available titles.

C.5.2.3. Brodart will strive to achieve invoice accuracy of 100% as measured by items ordered.

C.5.2.4. Brodart can comply with this requirement.

C.5.2.5. Brodart can comply with this requirement.

C.5.2.6. Brodart can comply with this requirement.

C.5.2.7. Brodart offers a number of methods for submitting orders:

- Submit your order directly to Brodart through Bibz, Brodart's online collection development and ordering tool. A full description of Bibz has been provided in Attachment A, including relevant screenshots.
- Import on-order records from Bibz.com in a format developed especially for your integrated library system (ILS). You can import on-order records directly into your system with or without the distribution information. On-order records are typically used to create a purchase order in the ILS.
- Submit orders directly to Brodart from your ILS. Brodart fully supports X12 or EDIFACT formatted electronic business transactions including purchase orders, order acknowledgements, and invoices.
- Fax orders to 800.999.6799.
- Telephone orders by calling 800.474.9802.
- E-mail orders to bookscs@brodart.com.
- Mail orders to Brodart Co. Books & Library Services
Order Department
500 Arch Street
Williamsport, PA 17701

There is no minimum order requirement.

C.5.2.8. Brodart can comply with this requirement.

C.5.2.9. Brodart can comply with this requirement.

Brodart's single inventory location in Williamsport, Pennsylvania enables us to fill orders quickly and efficiently. Shipments are sent free of charge via best method (common carrier, USPS, or UPS Ground) F.O.B. destination from our warehouse to your main location. Branch shipping is also available for an additional fee.

C.5.2.10. Brodart can provide rush delivery to Authorized Users within a 24-hour window upon request, however, this will incur an additional charge depending on the method

selected (overnight, 2-day, etc.). Requests for rush delivery services due to a vendor error will be reviewed and authorized on an individual basis.

C.5.2.11. Brodart's boxes are made of heavy corrugated cardboard and are extremely durable. We take special care when packing your order. Larger items are packed first, then smaller ones, packed spine-to-spine to prevent damage. The number of items, their thickness, and weight determine the size of the box used for packaging. Boxes are filled with thin newspaper-type brown paper; however, Brodart does not provide shrink wrapping when packing orders. Self-adhesive shipping labels are applied to the top of every box. Boxes are sealed with tape that is constructed of paper, string, and glue. Boxes within a shipment are numbered (i.e. 1 of 6, 2 of 6, etc.) and indicated on the top of each box.

To make checking in shipments easier, Brodart's packing slip is packed in the last carton of every shipment. The carton indicates that a packing slip is enclosed. This packing document includes the title, author, ISBN, quantity shipped, customer purchase order, and list price of each item, as well as a control number, which can be matched with a corresponding invoice.

We continuously evaluate our processes to increase efficiency, minimize waste and comply with environmental guidelines. A concentrated effort is placed on implementing environmental management practices developed to ensure our operations respect, protect, and sustain the natural environment. Brodart's commitment to environmental awareness and preservation is reflected throughout our business. We fulfill our commitment by applying the principles of reduce, reuse, and recycle in all processes.

Brodart does not distribute hazardous materials.

C.5.2.12. Brodart Books and Library Services Return Policy

Authorization* from your Customer Care Associate is necessary prior to returning any item(s). When required, freight costs for authorized returns will be covered by Brodart.

- Publisher defective and/or damaged products may be returned upon request within three months of the invoice date. Record the damaged and/or defective item on the reverse side of the packing slip and return to Brodart. You have the option of receiving a no-charge replacement or credit.**
- Vendor error relative to incorrect processing, title, bind, wrong year or edition, etc., materials may be returned upon request. Record the error on the reverse side of the packing slip and return to Brodart. Appropriate items will be reordered and invoices adjusted accordingly.
- Materials processed in accordance with account specifications or materials that have been stamped, marked, or accessioned by the library are non-returnable.
- Materials ordered and delivered as the result of customer error or duplication by another source are non-returnable.
- Approval to return material that is not suitable because of subject or language not reflected in review sources will be handled on an individual basis at the time of request. Approval in these situations will not allow for processing and/or freight charges to be refunded.

*A 15% handling fee *may* be applied for unauthorized returns to cover the cost of receiving and returning the material to inventory.

**If you choose to receive a credit, please contact your Customer Care Associate. If you choose a no-charge replacement, Brodart can reorder the material for you and adjust invoices accordingly. Or, if the total retail price of the material is less than \$50.00, simply return the items with a copy of your invoice or packing slip, note the problem, and deduct the amount from the invoice.

C.5.2.13. Authorization from your Customer Care Associate is necessary prior to returning any item(s). Any item received damaged, defective, or not as ordered (wrong title supplied, short shipment, etc.) will be replaced or a credit will be issued. Requests to return items for any other reason will be handled on an individual basis.

C.5.2.14. At Brodart, the sale does not end with delivery of the product. We value an ongoing, supportive relationship with our customers. Two individuals will be assigned to your account to handle customer service inquiries. Your Customer Care Associate, Linda Eckman, will be the Authorized Users main contact and will answer any day-to-day questions concerning account issues (order status, delivery information, backorder information, contract issues, or general product information). Linda is available by calling Brodart's toll-free number 800.474.9802, or via fax at 800.999.6799 or e-mailing Linda.Eckman@brodart.com. Your Sales Manager, Jason Goodson, is also available to handle account issues or assist in situations best served by a personal visit. You can reach Jason by calling 800.233.8467, ext. 6312 or via fax at 800.999.6799 or e-mailing Jason.Goodson@brodart.com. Jason is available at your convenience Central Standard Time. All Brodart representatives respond to all inquiries within one business day.

C.5.2.15. Brodart can comply with this requirement.

C.5.2.16. Brodart can comply with this requirement.

C.5.2.17. Any item received damaged, defective, or not as ordered (wrong title supplied, short shipment, etc.) will be replaced or a credit will be issued. When required, freight costs for these returns will be covered by Brodart. All vendor errors will be handled in this manner. Requests to return items for any other reason will be handled on an individual basis. While we make every attempt to satisfy our customers regarding defective items, we ask that items showing normal wear and tear not be returned. Authorization from your Customer Care Associate is necessary prior to returning any item(s).

C.5.2.18.

Confirmation Report

Confirmation of titles ordered can be supplied to the library when orders are entered. The Confirmation Report will include the author/editor, title, ISBN, list price, discount, extended price, and status (not yet published, out of print, must order direct) and is available via e-mail or FTP. The confirmation reports are generated by account number, and titles will be arranged alpha by author or by title. Orders transmitted via EDI will receive an EDI acknowledgment within an hour stating the status of each item ordered. Web site orders transmitted through Bibz, Brodart's online collection development and ordering tool, will receive same-day order status information.

On-Order Title Status Report

Brodart offers a number of options for receiving order status information. The Order History tab in Bibz allows the library to access not only orders that have been submitted through Bibz, but also orders submitted to Brodart via EDI, telephone, or any other order method. A summary is provided indicating current status (entered, booked or closed). Orders may be searched and sorted to provide quick reference of specific details. Each order can be opened to show title level detail with current status information such as shipped, in process, back ordered, cancelled, etc. This can be used in place of or in conjunction with confirmation, status and cancellation reports.

If preferred, the library can receive order status information via Brodart's On-Order Title Status Report. This report will identify, by account number, the status of all titles on order. This report includes the ISBN, quantity ordered, author, title, customer purchase order number, list price and order date. The On-Order Title Status Report is available weekly, monthly, or upon request via e-mail or FTP.

C.5.2.19. Brodart can comply with these requirements. Replacement items for damaged material will be ordered, or if no longer available a credit will be issued, in two business days of notice.

C.5.2.20. Brodart's invoices are available in duplicate and include the title, author, ISBN, publisher, published date, invoice date, quantity, list price, discount, unit price, and extended price, as well as your purchase order number. If required, the order date can be shown in the "customer reference" field of the invoice. Cataloging and processing charges

can be either billed on a separate invoice or listed on an item invoice as a separate line item. Invoices are available in paper or electronically via e-mail or FTP. EDI formatted invoices are available for orders sent to Brodart in an EDI formatted purchase order transaction. Our payment terms are net 30 days from the date of the invoice.

Invoices with the requested number of copies will be provided to the appropriate individual(s).

Brodart's many invoice options include the preference to contain only items covered by a specific purchase order. We understand that only invoices with approved contract pricing are considered valid.

C.5.2.21. Contact your Customer Care Associate, Linda Eckman, immediately to resolve any issues. She will escalate the issue as needed and involve the sales department, members of management when necessary, depending on the nature of each issue.

C.5.2.22. Bibz is Brodart's online catalog and ordering tool. Access is available when a Bibz account is established. Because this is an active website catalog containing over four million items, an electronic copy on CD is not available; however, you can view the most recent version of our online catalog for RFP evaluation purposes. We have provided the following temporary Bibz access information:

Website address: www.brodartbooks.com
Bibz temporary username: OKSTATEBID
Bibz temporary password: OKSTATEBID

Please disregard the discounted prices shown on Bibz. The pricing applicable to the State of Oklahoma will be shown after an award has been made and appropriate accounts are set up.

Selection lists are electronic and available through Bibz. The "Lists" tab in Bibz offers several hundred special lists built by Brodart's Collection Development staff and updated regularly, most are updated monthly while a few are updated quarterly. The sections and sub-sections are described below but may change from time to time to reflect current trends. These lists are found on the Lists tab, underneath My Lists and Lists Shared to Me. Each section, sub-section, and list can be opened with a click. These lists are free to all Bibz customers.

Awards

- ALA—awards given by ALA and its divisions
- State Awards—state award nominees, winners and reading lists
- More Awards—literary awards bestowed by bodies other than ALA

Common Core State Standards

- Recommended titles by grade range—titles for all ages which meet the standards of quality, rigor, and text complexity
- Professional Titles—chosen to assist teachers in developing lesson plans
- Common Core Appendix B Exemplars—the sample titles suggested by CCSS

Featured Lists

- Blockbusters—the latest and forthcoming high-demand, must-have adult titles
- Children's and Teen—a variety of lists including blockbuster titles for youth, recreational nonfiction, and teen reads for adults
- Hot Topics—up to the minute, newsworthy subjects
- Picks for Public Libraries—practical adult nonfiction not likely to be reviewed
- Publisher Lists—from our publisher partners
- Summer Reading—age level lists based on national themes

Graphic Novels

Titles for all ages selected and age-rated by graphic novels expert, Kat Kan. Kat also provides annotations for the titles she judges to be “KidSafe”.

Insight

Monthly online catalog of forthcoming titles that we predict will be in demand with public libraries, separated by audience level. Includes all subject areas plus specialty lists for board books, urban fiction, and more

Public Library Collection Builders

The best backlist and forthcoming titles in each major collection category, separated by audience level

Spanish

- Children/Teen—titles recommended after book-in-hand examination of language and content
- Adult—recent blockbuster titles plus other popular fiction and nonfiction

Please contact your Customer Care Associate, Linda Eckman, if you are interested in a free Bibz demonstration. Complete details on Bibz have been provided in Attachment A.

ATTACHMENT A

ADDITIONAL INFORMATION, PRODUCTS AND SERVICES

CATALOGING AND PROCESSING OPTIONS

Choose any combination of Brodart's professional cataloging and processing options to ensure you receive shelf-ready materials designed to meet your library's specific needs.

Option 1

Starter Cataloging and Processing

Brodart's automated Starter services will provide your library with full-level MARC records via FTP or e-mail to be downloaded into your integrated library system. In addition, basic item records with accompanying barcodes can be supplied to assist you in getting materials to your patrons more quickly.

Item records can be mapped to the tag required by your ILS and can include:

- a call number
- a barcode number
- list price
- location code or collection code (constant data)

Processing options include:

- Mylar jacket (attached or loose) for your books with dust jackets
- spine label
- barcode
- customized book pocket
- property identification stamp and/or label
- theft detection
- RFID tag
- genre/classification label
- label protector

Cataloging and processing through Starter services is a cost-effective and efficient way to expedite item level processing.

Option 2

Flex Cataloging and Processing

Brodart's Flex service builds upon Starter services by adding advanced mapping and formatting capabilities. Flex combines the benefits of item-in-hand cataloging and processing while maintaining the simplicity and speed of an automated process.

Flex service offers the following benefits to help streamline your acquisitions, cataloging and receiving processes.

- eliminate the need to separate orders by specific areas of your collection
- maximize the value of your local call numbers, collection codes, and other acquisitions data
- map more content and format options into your MARC record and holdings tag
- custom options for formatting and stacking data on spine labels
- 100% cataloging option to ensure full-level MARC records for every title received
- update your holdings with OCLC
- receive your MARC and linked item records electronically via FTP or e-mail
- handle fewer packages, packing lists, and invoices

Option 3

Compleat Cataloging and Processing

For customization beyond our automated Flex services, Brodart's premier Compleat service provides material-in-hand cataloging and processing. Our professional team provides expert service to ensure your library's specifications are followed down to the smallest detail.

This personalized service offers the assistance of an experienced installation team to work with your Technical Services Department to profile your local cataloging, classification, processing and account

requirements. Your installation team will include a project manager, cataloging services librarian, and collection development librarian.

Compleat services offer:

- item-in-hand cataloging
- customized bibliographic records in MARC format to meet your local practices
- classification tailored to fit within your library's existing collection
- customized holding records
- guaranteed full-level MARC and item records for every title received
- physical processing customized to your library's specifications

Brodart's Compleat cataloging and processing service provides book-in-hand cataloging and item level processing for English and Spanish-language material. Brodart will access your database via Z39.50. Our cataloging workflow includes Brodart searching your cataloging database to determine if a matching bibliographic record is present. If a matching bibliographic record is found in the database, Brodart will use Z39.50 functionality to save the record to a local file. A holdings tag will be created for each item being added to the collection following your integrated library system's MARC holdings tag mapping.

When new cataloging is required, catalogers will review, modify, and upgrade existing bibliographic records or provide original cataloging to meet your local cataloging practices. A holdings tag will be created for each item being added to the collection following your integrated library system's MARC holdings tag mapping.

After cataloging has been completed, all bibliographic records with holdings data will be saved to files which will be available to the Library via FTP or email. An email notification will be sent to library personnel so the records can be retrieved and loaded into your database. These files will be posted once a day.

In addition, Brodart can update your holdings to OCLC, if desired.

Once the cataloging records are created to your specifications the item records will be added, spine labels will be printed and physical processing will be completed.

Pricing for Flex and Compleat services is dependent upon specifications and is available upon request. Utilization of Compleat service may be based on an annual minimum commitment.

Brodart Cataloging Standards

Regardless of the cataloging option you choose, you can be assured that you will always receive full-level, high quality cataloging records for your material. We base our descriptive cataloging on Anglo-American Cataloging Rules, 2nd edition revised (latest update) and accompanying Library of Congress Rule Interpretations, and RDA and the accompanying Library of Congress-Program for Cooperative Cataloging Policy Statements (LC-PCC PSs). In addition, we use Library of Congress Subject Headings, latest edition, Dewey Decimal Classification, 23rd edition, MARC 21 specifications and Guidelines on Subject Access to Individual Works of Fiction, Drama, Etc, (GSAFD, 2nd Edition). We adhere to the Library of Congress rules for both MARC format and authority control.

RDA Practice

When an RDA record is available, we accept and modify the record according to RDA; when an AACR2r record is available, we accept and modify the record according to AACR2r. When both an RDA record and an AACR2r record are available, we will choose the RDA record and modify the record according to RDA. If no record is available, we catalog according to RDA and retain the RDA record even if LC later catalogs that same title.

Reinforcement Services

Brodart's BrodartGuard and BrodartConvert reinforcement processes give you guaranteed paperback protection that is fast, easy, and affordable. Paperbacks ordered through Brodart can easily be reinforced or converted to hard covers using either of our affordable techniques. Brodart's in-house service protects your paperbacks without delaying your initial order. Your paperbacks are processed quickly and shipped with the rest of your items, saving you the time and expense of preparing separate purchase orders or receiving separate shipments.

Brodart's BrodartConvert service will stretch your book budget dollars by prolonging the life of your paperback books. The process uses the original paper cover of books at least ¼" thick, laminated onto heavy binder board and rebound with strong, permanently flexible glue. The result is a book with hardcover durability for a little more than the cost of a paperback. BrodartConvert is guaranteed to your satisfaction.

BrodartGuard reinforces a paperback book using a 10-mil laminate to increase circulation durability. The one-piece process includes a 2-mil spine section to allow flexibility in movement and prevention of bubbling as seen in similar processes. The crystal clear, 100% optical clarity material and non-yellowing adhesive keeps the cover art attractive and bright. BrodartGuard is guaranteed to your satisfaction.

Both BrodartGuard and BrodartConvert processes

- are available for paperbacks ordered with or without additional cataloging and processing options.
- have been perfected over 30 years of successful use.
- are easy to order—simply indicate on your order the paperbacks you would like to have reinforced.
- have no minimum order requirements.
- feature bindings that are individually handcrafted to ensure quality workmanship.
- are guaranteed to your satisfaction. If you receive a book and the bind quality is unacceptable, you may return the book for replacement as long as the book is available from the publisher.

BRODARTBOUND BOOKS

Turtleback's high-quality bindings significantly extend the life of a book by using the finest materials and processes in the industry. More durable double-fan adhesive or sewn binding replaces the publisher's original binding. The publisher's colorful, illustrated paperback cover is scanned, digitized, and reprinted to produce new cover sheets that are wrapped around heavy hardback board.

A lifetime guarantee on workmanship and materials accompanies the binding of every Turtleback book.

Turtleback's growing collection of titles contains over 8,000 of the most popular titles for children and adults including Picture Books, Beginning Readers, Chapter Books, Middle Grade, Young Adult, Graphic Novels, Juvenile Nonfiction, Literature, Adult Fiction, Adult Nonfiction, Reference, Spanish. Easily access Turtleback's title collection through Bibz.

CONTINUATIONS

Brodart's Continuations Service is designed to meet your complete reference and serial titles needs. You receive prompt, accurate fulfillment and because of our extensive coverage, your need to research hundreds of titles each year is eliminated.

- Brodart maintains constant communication with over 45 thousand publishers and distributors. Our title file is updated daily, ensuring that the title status information you receive from Brodart's Continuations Department is the most up-to-date available.
- Serial maintenance is made easier when you use our free monthly status reports and skilled personal assistance. And to simplify establishing a standing order account, we offer you a full range of transition services.
- The Continuations Department personnel are dedicated professionals who are knowledgeable about all aspects of the Continuations Service. They take pride in providing prompt and accurate responses to any questions. Each library is assigned their own Continuations Consultant. That individual will stay in close contact with the responsible person at the library to ensure optimum service.
- Brodart's Continuations Service offers an Alternate Year Program, which can be tailored to meet your library's needs. You may receive books as frequently or infrequently as desired.
- You may add new titles to your standing order or adjust existing orders at any time. Our files are updated daily in order to provide you with prompt, accurate service. All cancellations are effective immediately upon receipt by the Continuations Department.

A monthly status report is supplied to you at no extra cost so you may quickly and effectively monitor your standing orders. This report lists every series and serial on your standing order. Editions or volumes on

order or recently shipped titles are listed accordingly. Publications which are delayed by the publisher show a status of "on order." Brodart's Continuations Department automatically contacts the publisher in the case of "on order" materials to assure timely delivery of these items.

As a Continuations customer, each month you will receive an electronic newsletter reporting the latest updates in title/bind changes, series discontinued, series completed and items to be ordered directly from the publisher. The newsletter keeps you informed about any changes that would affect your standing order.

TitleQueue.com, Brodart's online Continuations tool, gives access to account details regarding subscriptions to serials and series. You can search for titles and update subscription information to add standing order titles or change current settings. You can also access order confirmations, report claims and request additional copies of invoices. There are many search options, including ISBN, title, series title and publisher.

Taking advantage of Brodart's Continuations Service is easy. Simply list the titles to be ordered with starting volumes, years or editions and the desired quantities. Once Brodart receives the comprehensive title listing which contains your standing order titles, we will immediately begin establishing your account while simultaneously ordering the titles from the various publishers.

To make it easy to transfer to Brodart's Continuations Service, we will also send a cancellation notice to your former supplier. You need only indicate in writing which titles are to be cancelled, your account or purchase order number and the name of the supplier. The Continuations staff works with your library during this transition period to assure a smooth transfer of all standing orders. Furthermore, if there is some duplication of titles, Brodart will assume responsibility and accept any such returns. Once all of the titles have been entered into our database, we can determine any must-order-direct titles and will notify the library of such titles.

COLLECTION DEVELOPMENT SERVICES

Collection Builder® Custom Selection Lists

Brodart has identified more than 400 recommended bibliographies, review journals, and other sources, and has indexed them in our up-to-date title database. This extensive resource enables us to produce custom selection lists for a wide range of collection development needs such as collection building in specific areas, coordinated replacement ordering, or planning opening day collections.

- These comprehensive selection lists present the titles in shelf-list order for a systematic approach to collection development.
- Each citation on the selection list includes call number, author, title, publisher, date, price, ISBN, bind, descriptors, media, age range, title status, review citations, and the sources which contain the title.
- It is easy to review the titles, make your selections, and mark the orders right on the list.
- To request a selection list, tell us the subject to be covered, age levels, types of bindings, publication dates, and other pertinent information. We may provide a profile to walk you through the process.
- Prepared selection lists are typically delivered within one week. These custom selection lists are provided free of charge in Bibz to active Brodart customers with the understanding that any titles ordered from these lists are to be ordered from Brodart.

TIPS®

TIPS (*Title Information Preview Service*) is designed to help your library streamline its ongoing selection process. We identify new titles, gather all pertinent information on those titles, eliminate duplicates, and present you with regular lists of new titles to consider for your collection. Three levels of TIPS are available to accommodate your specific needs. We do the legwork; you make your selections.

These profile elements, chosen specifically to meet the needs of libraries, allow you either to create a profile that mimics your current title identification and list-building process OR to explore new approaches to the collection-building process. In other words, if you currently compile lists from multiple journal reviews, we can do that for you. Or, if you would like to expand the number of sources from which you draw titles, we can monitor new titles by publisher, series, author, or illustrator.

Silver TIPS

Monthly lists of the most popular titles delivered to your online account free of charge for Brodart customers. Full-text reviews are provided when available.

Silver TIPS Program Descriptions

CHILDREN'S

Board Books for Libraries

- Formats appropriate for public library use in terms of size, shape, and materials
- Selected by our children's buyer
- Most titles due for publication within next two months

Top Children's Hardcover Titles

- Popular and high-quality books for children through age twelve
- Emphasis on picture books, but nonfiction, fiction, and graphic novels also included
- Seasonal coverage for holidays plus one topical backlist each month
- Most titles are one month prepublication

Top Children's Paperback Titles

- Best new releases for children through age twelve
- Many reprints of popular hardcovers, but also includes paperback originals, especially popular series
- Emphasis on titles classed as Easy, but also includes fiction and nonfiction
- Most titles one month pre-publication or current month of publication

Children's *KidSafe* Graphic Novels

- Graphic novels that have been reviewed book-in-hand or online and judged suitable for children through age twelve
- Titles are both popular and high quality
- Includes manga and other series, plus important single titles and nonfiction in a graphic format
- Includes a range of publication dates due to book-in-hand review requirement

Fresh Reads for Kids

- Forthcoming titles from children's favorite authors
- Primarily picture books and fiction, with some easy readers and nonfiction included
- Hardcover, reinforced, and library editions, as well as paperbacks
- Publication dates from the current month up to three months pre-publication

TEEN

Top Teen Hardcover Titles

- Popular and high-quality titles for middle school and high school readers (age ten and up)
- Emphasis on fiction, particularly science fiction, fantasy, and horror; also includes nonfiction for recreation and school support
- Selected high interest/low reading level titles and graphic novels
- Most titles are one month pre-publication

Top Teen Paperback Titles

- Best new releases for middle school and high school readers (age ten and up)
- Many reprints of popular hardcovers, but also includes paperback originals, especially popular series
- Emphasis on fiction, but some nonfiction and graphic novels included
- Most titles one month pre-publication or current month of publication

Teen *KidSafe* Graphic Novels

- Graphic novels that have been reviewed book-in-hand or online and judged suitable for ages ten and up
- Titles are both popular and high quality
- Includes manga and other series, plus important single titles and nonfiction in a graphic format
- Includes a range of publication dates due to book-in-hand review requirement

Graphic Novel Reads for Teens

- Popular graphic novels for ages ten through nineteen
- Incorporates Teen KidSafe but expands the selection with other titles suitable for tweens and teens
- Includes manga and other series, plus important single titles and nonfiction in a graphic format
- Titles may be up to four months pre-publication

ADULT

Popular Reading

Blockbusters

- Hardcover titles that no public library can be without!
- Adult fiction and nonfiction from the most popular authors or on hot topics
- Titles with large print runs and heavy publisher promotion
- Three to four months prepublication

Top Adult Hardcover Titles

- High demand adult popular reading
- Fiction and nonfiction from top-selling authors plus titles from promising first novelists
- Selected movie tie-ins and graphic novels
- Includes Blockbusters (available separately above) plus other titles to round out genre interests
- Three to four months prepublication

Top Adult Paperback Titles

- The best upcoming paperback titles for a popular reading collection
- Emphasis on high demand authors and titles, including titles that were New York Times Bestsellers in hardcover
- Mostly fiction but some nonfiction included
- Includes both originals and reprints, trade and mass markets
- Most titles one month prepublication

UrbanFix

- Urban fiction (aka street lit) for the adult collection
- Emphasis on African-American characters in an urban setting
- Includes titles with sex, violence, drugs and strong language
- Primarily trade paperback but some hardcovers and mass markets included
- Most titles from current month up to two months pre-publication

Christian Fiction

- Christian Fiction for the adult collection
- Emphasis on Evangelical Christian fiction; also includes Urban Christian
- Hardcover and trade paperback bindings
- Publication dates from current month up to four months pre-publication

Specialty Programs

Large Print TIPS

- Extensive list of large print offerings from all the major publishers
- Most titles are adult fiction, but adult nonfiction and some titles for young readers also included
- Most titles are two months prepublication

Picks for Public Libraries

- Practical adult nonfiction that is not likely to be reviewed
- Hardcovers and paperbacks on topics such as computers, math, health, business, weddings, pet care, and more
- 125 to 150 titles per month chosen by our experienced staff
- Most titles one month prepublication

Graphic Novel Reads for Adults

- Popular graphic novels for intended for an adult audience
- Includes manga and other series, plus important single titles and nonfiction in a graphic format
- Most titles one to three months pre-publication

SPANISH

Top Spanish Titles

- The best fiction and nonfiction for native Spanish speakers
- Titles from offshore and U.S. publishers
- Focus on international authors, but also includes translations of popular U.S. titles
- Publication dates vary from two months prepublication to six months post-publication (but recently available for U.S. distribution)

Adult Spanish TIPS

- Recommended Spanish language fiction and nonfiction

- Titles from offshore and U.S. publishers; originals and translations
- Focus on fiction and practical nonfiction in hardcover and paperback
- Includes Top Spanish Titles (available separately above) plus others to expand the selections
- Publication dates vary

Children's & Teen Spanish TIPS

- Recommended bilingual and Spanish language titles for preschool through high school
- Titles from offshore and U.S. publishers; originals and translations
- Focus on picture books and nonfiction, but also includes fiction, board books, and graphic novels
- Publication dates vary

AUDIO

Top Spoken Word Audio Titles

- New releases from popular authors
- Focus on high demand titles with bestsellers and various fiction genres; some nonfiction included
- Most titles are for adults, but select children's and teen titles included
- Compact disc (both regular and MP3) and Playaway formats; more unabridged than abridged; retail editions with some library editions included
- Most titles two to three months prepublication

Spoken Word Audio Playaways

- All new titles available in Playaway format
- Adult and children's; fiction and nonfiction
- Publication dates of original titles vary

Gold TIPS

Customized title lists, delivered to your online account weekly, twice monthly, or monthly. Transform *Silver TIPS* lists into *Gold* by specifying parameters such as publisher, author, series, subject category, and format. For example, you want the Large Type Fiction list but with titles from Thorndike excluded. Or, you want Children's Nonfiction, but only certain Dewey ranges.

Diamond TIPS

Brodart's hallmark TIPS. Review-based, custom profiles for title lists with full-text reviews delivered to your online account weekly, twice monthly, or monthly. Upgrade any *TIPS* list to *Diamond* by combining any other parameters with specific review journals. There is no limit on the number of review journals per profile. For example, you want a Teen Fiction profile based on Booklist, School Library Journal and VOYA plus a list of authors. Or, you want an Adult Nonfiction profile that includes Library Journal, Publishers Weekly, and Picks for Public Libraries.

Journals available:

Booklist (includes online reviews)
BookPage (includes online reviews)
Bulletin of the Center for Children's Books
Horn Book
Kirkus
Library Journal (includes online reviews)

Library Journal Prepub Alert
Publishers Weekly (includes online reviews)
School Library Journal (includes online reviews)
VOYA (includes online reviews)

TIPS lists are available on a subscription basis to Brodart customers. TIPS pricing is included for your review.

FASTips®

Brodart offers standing orders for popular adult and youth fiction and nonfiction through FASTips (Frequent Author & Series TIPS). The profiling is very flexible and can accommodate unique needs. Most FASTips orders are based on author or series lists. Brodart offers the following lists to assist the library; however, these are not closed lists and the library can add authors or series as needed.

- Adult Authors—African-American and Urban Literature
- Adult Authors—Fiction
- Adult Authors—Inspirational
- Adult Authors—Nonfiction
- Adult Series—Fiction
- Adult Series—Graphic Novels

- Adult Series—Nonfiction and Biography
- Adult Series—Travel Guides
- Children’s Authors
- Children’s Series—Chapter Books
- Children’s Series—Easy Readers
- Children’s Series—Fiction
- Children’s Series—Graphic Novels
- Children’s Series—Nonfiction and Biography
- Children’s Series—Picture Books and Board Books
- Teen Authors
- Teen Series—Fiction
- Teen Series—Graphic Novels
- Teen Series—Nonfiction and Biography

Other sources such as starred reviews, bestseller lists, and Brodart programs can also be used for FASTips automatic orders. Special collection areas that can be covered by FASTips include board books, large print, browsing paperbacks, travel books, and Spanish.

The library would first select the authors, series, or other criteria desired. Then they would set other parameters for the automatic order including format (bind preference), classification, age range, material types, and maximum price. The library would also set the timeframe for ordering. Three months prepublication is the current standard.

Orders can be prepared by Brodart and delivered to the library via Bibz.com with grids applied for branch, quantity, and other grid values. Brodart can submit the order via Bibz.com or share the list to library staff for review and modification if needed. Orders can then be submitted via Bibz.com or downloaded as MARC files for import into your ILS for EDI ordering. After the orders are submitted, they are visible with status information through the Order History tab of Bibz.com. Additional reporting can be arranged through your Customer Care Associate.

There is no charge for FASTips automatic order profiles.

Bibz

Bibz is Brodart’s online collection development and ordering tool. Using Bibz’s flexible features, you can search and access relevant titles, build your own lists, select the best items for your collections, and place orders online or through your acquisitions system. Our enhanced features allow you to customize your display and manage user access and grid ordering. You can conduct simple or advanced searches quickly and easily within Brodart’s title database of more than four million records. Bibz allows you to:

Item Search:

- By keyword or exact search for title or series
- Within a large number of databases and resource lists
- Access one or many of the following fields as needed
 - Title
 - Author
 - ISBN/EAN
 - Series
 - Illustrator
 - Biographee
 - Subject
 - Publisher
 - Availability (print and stock status)
 - Broad classification
 - Dewey or Library of Congress classification
 - Format
 - Descriptors (board book, large type, picture book)
 - Language
 - Age or grade range
 - Reading program and level
 - Publication date
 - Review journals, including number of reviews and issue date
 - Demand level
 - Price range

Access:

- Basic bibliographic information and enhanced selection data
 - Title
 - Author, illustrator, editor
 - Publisher
 - Publication date
 - ISBN-10 and ISBN-13
 - Format
 - Availability (print and inventory status)
 - Cover image
 - Physical description
 - Other descriptors (e.g. large type)
 - Age and grade range
 - Dewey and Library of Congress classification
 - Language
 - Series
 - Library of Congress card number
 - Demand level
 - Print run
 - Source citations for bibliographies, starred reviews, and awards
 - Subject headings
 - Reading programs with reading level
 - Discounted Price
- Annotations plus full-text reviews from ten journals
- Custom lists provided through the TIPS, FASTips and Collection Builder services
- Specialty lists built for public libraries
- Your library's holdings by ISBN
- MARC records
- Order History to view item status

Build:

- Your own selection lists and orders
- Selection lists to be shared with others in your library
- Local notes for others in your library to see

Manage:

- All selection lists, including shared and special
- User access, determined by your administrators
- Prevention of duplicates according to your preferences
- Grids—create templates and revise at your convenience

Order:

- With grids reflecting your branch/location codes, collection codes, item types, and funds
- Directly via the Web
- Import records into your ILS for EDI ordering
- Access the order history for all of your accounts

Additional Functionality

Sort sequence: Titles in search results and lists default to Title/Author sequence but can be resorted in a variety of ways including Author/Title, Pub Date/Title, Publisher/Title, Price/Title, Demand/Title, Dewey Class/Author/Title, Dewey Class/Title/Author, LC Class/Author/Title, LC Class/Title/Author, Age Range/Author/Title, or Reading Program/Author/Title.

Duplicate checking: Bibz provides automatic duplicate checking against all your lists and orders. Icons indicate whether the title is in another list or on a submitted order. In addition, these icons link directly to Duplicate Detail screens. Duplicate check options are also available when adding a title to a list. The user can set the preference for the level of duplicate checking (e.g. do not alert on duplication, check for duplicates in the target list by ISBN, check for duplicates in all lists by ISBN, etc.). In addition to these features, it is also possible to check duplicates for an entire list.

The screenshot displays the Bibz web application interface. At the top, there is a navigation bar with links for HOME, SEARCH, LISTS, ORDER HISTORY, PROFILE, and USER'S GUIDE. The user is logged in as TESTUSER87. The active list is 'Children Spanish' with 88 titles and items, totaling \$1,508.66. The processing profile is 'ADULT - CBS - CAT / PROC'. The list is titled 'List: Children Spanish' and has a 'Global Qty' of 1. A dropdown menu is open, showing various actions such as 'Update List', 'FTP MARC Download', 'Generate Brief PDF', 'Generate PDF with Reviews', 'Generate CSV File', 'Generate Excel File', 'Generate 3x5 Format PDF', 'Generate 3x5 Format PDF (laser printer)', 'Generate Brief 3x5 Format PDF', 'Generate Brief 3x5 Format PDF (laser printer)', 'Copy Selected Titles', 'Move Selected Titles', 'Delete Selected', 'Delete All Zero Quantity Items', and 'Dupe-Check Lists/Orders'. The main table lists books with columns for AUTHOR, FORMAT, ITEM NO. DEWEY, PUBLISHER, PUBDATE, AVAILABILITY, and PRICE. The first row shows 'Ruiz, Celia' with 'Trade Paper' format, item number 9788467701809, published by Susaeta Publishing Inc. on 07/01/2011, with an availability of 'On Order: 16' and a price of \$17.95. The second row shows 'Garza, Xavier' with 'Trade Paper' format, item number 9781933693989, published by Cinco Puntos Press on 10/18/2011, with an availability of 'On Order: 8' and a price of \$12.95. The third row shows 'Lombardi, Kristine' with 'Hardcover' format, item number 9780545314343, published by Scholastic Inc. on 07/01/2011, with an availability of 'Available' and a price of \$12.99. The fourth row shows 'Alvarez, Julia' with 'Mass Paper' format, item number 9780375857935, published by Yearling Books on 09/01/2011, with an availability of 'In Stock: 4' and a price of \$6.99. The fifth row shows 'Yolen, Jane' with 'Hardcover' format, item number 9780545348429, published by Scholastic Inc. on 09/01/2011, with an availability of 'In Stock: 4' and a price of \$6.99. The sixth row shows 'Bridwell, Norman' with 'Trade Paper' format, item number 9780545341189, published by Scholastic Inc. on 09/01/2011, with an availability of 'In Stock: 1' and a price of \$3.99.

Administrative functions: Users can be designated as administrative or non-administrative. Administrative users are empowered to create new users, remove users, assign new passwords, and grant access privileges to users. Those access privileges include the assignment of accounts/processing profiles, branches, and funds. Administrative users can create families and assign membership in those families. Administrative users can also set grid values and create grid templates and assign them to specific users. Last but not least, administrators decide which users have checkout privileges (the ability to submit orders online).

Order History: The Order History tab in Bibz allows the library to access not only orders that have been submitted through Bibz, but also orders submitted to Brodart via EDI, telephone, or other ordering methods. A summary is provided indicating current status (entered, booked or closed). Orders may be searched and sorted to provide quick reference of specific details. Each order can be opened to show title level detail with current status information such as shipped, in process, back ordered, cancelled, etc. This can be used in place of or in conjunction with confirmation, status and cancellation reports.

Bibz Sign Out | Quick Search:

HOME SEARCH LISTS **ORDER HISTORY** PROFILE USER'S GUIDE

Search Type: ☒ Orders ☐ Titles SEARCH CLEAR ?

Product: Search For:

Date:

[2] Matching Items Were Found

Action: APPLY

Search Totals	
Titles: 176	Cancel: 7
Quantity: 196	Shipped: 189
Open: 0	Item List: \$3,801.65
In Process: 0	Item Net: \$2,928.55
Reserved: 0	VAS: \$0.00
On Order: 0	S&H: \$0.00
NYP: 0	
On Hold: 0	Total: \$2,928.55

Order Name ▲	Order Date ▼ Order No.	Order End ▼ Status	Owner ▲ PONumber ▲	Product ▲ Order Type ▲	Service ▲ Order Source ▲	Titles/ Qty	Shipped/ Processing	NYP/ On Order	Cancel/ Reserved	On Hold/ Total Price
PER38 ORDER FOR 0240	02/28/2012 651832	03/01/2012 CLOSED	TESTUSER 0240 Emily-Anne Schulte	BOOKS	Items Only Online	175 175	168 0	0 0	7 0	0 \$2,645.05
EAS 	02/09/2012 643746	06/07/2012 CLOSED	0240 Emily-Anne	BOOKS	Items Only E-mail	1 21	21 0	0 0	0 0	0 \$283.50

MARC record options: Records may be downloaded for orders according to your needs. Save them to your local computer or deliver to your ILS FTP site. Our flexible MARC mapping tool enables us to customize your on-order bibliographic records and item records.

ILS interface: Brodart has created an interface between Bibz and your ILS.

Access to Bibz with unlimited users and full-text reviews is offered free of charge to the State of Oklahoma for the term of this contract.

ENVIRONMENTAL COMMITMENT

We continuously evaluate our processes to increase efficiency, minimize waste and comply with environmental guidelines. A concentrated effort is placed on implementing environmental management practices developed to ensure our operations respect, protect, and sustain the natural environment.

Brodart's commitment to environmental awareness and preservation is reflected throughout our business. We fulfill our commitment by applying the principles of reduce, reuse, and recycle in all processes.

Reduce	Reuse	Recycle
Routinely conduct energy efficiency studies	Current, used items are sold to the used book market	Use packaging materials containing 100% recycled content and may be recycled by the end user.
Converting to energy efficient lighting throughout the facility, reducing both energy consumption and CO2 emissions.	Other used items and outdated inventory are given to employees	Brodart shipping boxes contain 36% recycled content.
Installing lighting timers and dimmers to reduce our energy use		We use exhibit property made of sustainable, recyclable, and environmentally friendly materials.
Improved building insulation to reduce heat loss and energy usage;		Remainder inventory is recycled.
Preventative maintenance and energy management for the facility heating system reduces the oil and natural gas consumption and CO2 emissions.		Our in-house recycling program for paper, metal, cardboard and plastic has reduced the amount of waste being sent to the local landfill by more than half.

Brodart also promotes environmental responsibility among our employees and we clearly communicate our environmental policy, practices, and impact to all interested parties. We believe implementing these practices results in a cleaner, safer work environment for our employees and will ensure the continued stability and availability of natural resources for generations to come.

ATTACHMENT B PRICING PROPOSAL

Discounts

English-language material will be supplied to the State of Oklahoma at publisher's list prices less the following discounts:

Trade Hardcover Editions	46.0%*
Non-Trade Hardcover & Paperback Editions	12.0%*
Publisher's Library Editions	24.0%
BrodartBound	24.0%
Single Reinforced Editions (School & Library)	24.0%
Trade & Mass Market Paperback Editions	40.5%*
Continuations (see Attachment A for a description of services)	
Trade Hardcover & Paperback Editions	40.0%*
Non-Trade Hardcover & Paperback Editions	10.0%*

*Hardcover and paperback titles on which Brodart receives minimal or no discount and/or the publisher requires prepayment may be discounted at the non-trade discount or invoiced at publisher's list price.

Spanish-language material will be supplied to the State of Oklahoma at publisher's list prices less the following discounts:

Trade Hardcover Editions	40.0%*
Non-Trade Hardcover & Paperback Editions	20.0%*
Publisher's Library Editions	20.0%
BrodartBound	20.0%
Single Reinforced Editions (School & Library)	20.0%
Trade & Mass Market Paperbacks	40.0%*

*Hardcover and paperback titles on which Brodart receives minimal or no discount and/or the publisher requires prepayment may be discounted at the non-trade discount or invoiced at publisher's list price.

Discounts apply to any quantity ordered. Please see attached binding definitions.

Book Processing Options (applicable to books purchased through Brodart)

A variety of cataloging and processing options are available through Brodart. Please contact your Customer Care Associate, Linda Eckman, for more information.

Starter Automated Cataloging & Processing	\$.95
(includes an attached jacket, spine label, barcode label, and MARC record for English-language material)	

Brodart's Reinforcement Services

BrodartGuard (paperback reinforced with laminate)	\$ 2.20
BrodartConvert (paperback conversion to hardcover)	\$ 4.50

Collection Development Services

Collection Builder (Customized Selection Lists)

Collection Builder Custom Selection Lists	No Charge
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FASTips (Standing Orders)

FASTips Profiles	No Charge
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TIPS Profiles (Profiled Selection Lists)

Silver TIPS	No Charge
Gold/Diamond TIPS	\$100 per month per profile
Package pricing at a reduced rate available for five or more profiles. Final pricing determined after profiling.	

Online TIPS lists

Lists posted to your Bibz account

No Charge

Paper TIPS lists

\$15 per copy

Note: Standard delivery method is Priority Mail (United States Postal Service).

Other delivery methods are available for an additional fee.

Online Tool

Bibz is Brodart's online collection development and ordering tool.

Unlimited Users

No Charge

Shipping

Shipments will be made by best means (USPS, Common Carrier or UPS Ground) to the designated central location.

Shipping and Delivery

No Charge

Publisher's list prices are subject to change without notice. The above discounts and pricing will remain in effect each year of the contract (twelve months with the option to renew for up to four one-year periods).



CATEGORY/BINDING DEFINITIONS

Brodart Co., Books & Library Services

Trade Hardcover: Published with a glued binding and a hardcover. Trade discounted hardcover editions are usually fiction or current nonfiction and are generally published for the average consumer. Publishers promote and advertise these titles more aggressively and print runs are greater than the norm.

Juvenile Trade Hardcover: Published with a glued binding and a hardcover. Popular fiction or nonfiction books designed for children, usually with subject matter of broad appeal.

Publisher's Library Reinforced: Published with a high quality, usually fanned, sewn and glued binding. Sometimes known as a "School" or "Library" binding. This binding has the durability required in a high use library setting and is usually reserved for children's materials. All publisher library reinforced editions will receive the discount quoted in this category.

Hardcover Reinforced: Published with a durable fanned and glued hardcover binding that may or may not be sewn. Also known as "Single", "School" or "Library" binding. Subject matter may be directed at adults or juveniles (though they are usually reserved for children's materials) and may be fiction or nonfiction.

Non-Trade Hardcover: Published with a glued binding. Subject matter such as technical, reference, scientific, medical and/or is published by a small press for adult and juvenile readers. Titles on which Brodart receives minimal or no discount and/or the publisher requires prepayment may be discounted at the non-trade discount quoted in this category or invoiced at the publisher's list price.

University Press: Hardcover and paperback selections. This category includes materials for which Brodart receives minimal or no discount and/or the publisher requires prepayment.

Trade Paperback: Published with a paper cover. May also be known as a trade paper, quality paperback or mass market paperback. The quality of the paper and printing in trade and quality paperbacks is usually high. Mass market paperbacks are paperbacks sized to fit standard retail display racks; trade paperbacks have larger page sizes. Trade discounted paperback editions are generally published for the average consumer with subject matter of broad appeal.

Non-Trade Paperbacks: Published with a paper cover. Subject matter such as technical, reference, scientific, medical or small presses for adult and juvenile readers. Paperback titles on which Brodart receives minimal or no discount and/or the publisher requires prepayment may be discounted at the non-trade discount quoted in this category or invoiced at the publisher's list price. Publishers whose titles have limited sales volume and those who are not in compliance with Brodart's purchasing requirements may be in this category.

BrodartBound: Turtleback's high-quality bindings significantly extend the life of a book by using the finest materials and processes in the industry. More durable double-fan adhesive or sewn binding replaces the publisher's original binding. The publisher's colorful, illustrated paperback cover is scanned, digitized, and reprinted to produce new cover sheets that are wrapped around heavy hardback board.

BrodartConvert[®]: Originally published in paperback and converted to hardcover.

BrodartGuard: Paperback reinforced with a 10-mil (2-mil spine) laminated cover.

Playaway[®] Digital Audio: Audio content provided on an independent player.

Spoken Word Audio: Recorded reading of a book in abridged or unabridged form on compact disc format. Also known as audiobook.

DVD: Optical disc storage media format used for playback of movies with high video and sound quality.

Blu-ray: Optical disc storage media format used for playback of movies with high definition video and audio as well as advanced interactive features.