July 31, 2003

South West Information Network Group, Inc.
Elizabeth Horn, Contract Administrator
c/o Alexander Mack Memorial Library
Bridgewater College
402 East College Street
Bridgewater, VA  22812

RE:  A Proposal for Library Materials RFP 03-06-02
DUE:  August 1, 2003 @ 5:00pm

Dear Ms. Horn:

Thank you for allowing Baker & Taylor, Inc. (B&T) the opportunity to submit a proposal for the supply of library materials for the South West Information Network Group, Inc. (SWING). Having carefully reviewed the requirements of your members, we are confident that we can meet your specifications with the following clarifications. Please review the following, and accept this letter as part of Baker & Taylor, Inc.’s comprehensive proposal.

Initial Period of Contract:

The length of this contract is understood to be from January 1, 2004 through December 31, 2006. Baker & Taylor reserves the right to renew the terms and conditions of the contract if mutually agreeable to both parties.

The discounts extended to SWING members by Baker & Taylor will remain firm throughout the contract period, however, publishers’ list prices are subject to change without notice. The discounts outlined within this proposal are taken from the publisher’s current list price at the time of shipment.

REQUEST FOR PROPOSAL

VI.  GENERAL TERMS AND CONDITIONS:

VI.J.  PAYMENT

b.  Baker & Taylor’s payment terms are Net 30 days from the date of invoice.

VII.  SPECIAL TERMS AND CONDITIONS

VII.A.  AUDIT

Baker & Taylor will retain all records relating to this contract for 3 years after the end of the contract.

VII.B.  AUTHORIZED USERS

Upon award, Baker & Taylor will update all SWING members within our system to reflect the terms and conditions outlined within this Request for Proposal. Please note, Baker & Taylor must be notified of any additions and/or deletions of membership.
VII.J. RENEWAL OF CONTRACT

Baker & Taylor reserves the right to renew the terms and conditions of the contract if mutually agreeable to the contracting parties.

ATTACHMENT B – Services Requirements Deemed Important in Consideration of Contractor Selection

6. Describe how data about publishers/producers/distributors, titles, and availability are made available to customers.

Catalogs

The following monthly publications are available free of charge to Baker & Taylor customers:

**Book Publications**

**Booking Ahead**
Booking Ahead is Baker & Taylor’s prepublication announcement of titles to be published 2 months in advance. It includes annotated lists of popular trade titles, based on book trade prepublication publicity information.

**Books and More for Growing Minds**
Baker & Taylor’s Books and More for Growing Minds showcases the best in children’s literature and spoken word audio titles. Books and More for Growing Minds serves as a comprehensive guide to Baker & Taylor’s juvenile selections and features titles appropriate for all interest levels from toddlers through young adult. Each issue of Books and More for Growing Minds contains special theme collections that cover a variety of subjects of interest as well as a feature series section that highlights recent additions to the most popular Children’s series.

**Forecast**
Our most extensive publication, Forecast is a monthly magazine promoting soon to be published hard cover titles. Forecast speaks to librarians about future bestsellers and noteworthy mid list titles so they can make well informed buying decisions. Features include monthly subject collections as well as publicity news on upcoming author tours, media tie-ins, and serial and book club rights.

Independent Press Quarterly is a quarterly section in Forecast showcasing notable titles from independent publishers. This section focuses on the latest trends in publishing as well as information on current releases and other notable titles.

**Now Hear This**
Baker & Taylor’s monthly overview of new, forthcoming, and backlist audiocassette and CD titles. Listing 100-125 adult and children’s spoken word titles, Now Hear This spotlights our best selling “Featured Five” audio among the 35-40 new titles annotated in each issue. The remaining listings make up our monthly “Best of the Backlist Audio Medley,” which includes Baker & Taylor’s best-selling and current backlist audio titles.

**Paper Clips**
Featuring prepublication paperbacks, Paper Clips speaks to librarians about upcoming adult paperbacks. Although its focus is on titles four to six weeks prior to publication, Paper Clips also has mass-market backlist titles that publishers are promoting. In addition, every Paper Clips issue highlights a specific Roundup listing that features both frontlist and backlist titles related to a topic of particular interest.
School Selection Guide
The School Selection Guide is distributed to school librarians nationwide and lists more than 50,000 best selling children’s and young adult titles. Printed in two volumes – one for grades K-8 and the other for grades 7-12 – it is the school media specialist’s first choice for purchase guidance. Each School Selection Guide features title selections chosen by a team of collection development librarians and juvenile merchandising experts. Since The School Selection Guide reaches more school media specialists than any trade journal, it serves as a key reference tool for school libraries.

In the Know
In the Know reaches school media specialists with recently published non-fiction and reference titles. There are two versions of In the Know - one for elementary schools and one for secondary schools. In the Know’s annotated selections include grade levels to aid in the selection of age appropriate materials. The secondary edition includes both juvenile and adult titles suitable for teenage readers. Subjects that can be found include: biographies, computers, sports, history, science, college prep, and careers.

BT Bound
Baker & Taylor is pleased to offer BT Bound Books. BT Bound Books feature the true-to-life color and appeal of the original cover art, over-layered with the toughest mylar available. Books are cased in with a strong, reinforced hinge and durable two part, acid free folded endsheet.

Audiovisual Publications

The Alert™
For customers seeking comprehensive information on video and audio titles, the Alert™ is their complete media reference source. Baker & Taylor’s monthly Alert™ is the foremost distributor publication on feature film, special interest, foreign, children’s, family and non-theatrical video and audio titles. No other industry publication delivers as comprehensive and consistent a resource as the Alert™. Provided to libraries, the Alert™ is a fully annotated publication, delivering in-depth feature articles, exclusive interviews, title collections, retrospectives and much more. A typical issue includes the following sections or listings:

- Keys to Entries, Guide to MPAA Ratings and a Coming Soon listing of upcoming releases
- A “Second Look” at recently re-released and re-priced videos
- Instructional Video releases
- New Video releases
- Family Video releases
- DVD releases
- Music in categories from classical to gospel to jazz & blues, pop, country, soundtracks and world music
- Music and Video Bestsellers

Continuation Services Publications

Navigator
Mailed to the thousands of subscribers to Baker & Taylor’s Continuation Services program, Navigator features titles that are part of a series, serial, or set-in-progress. Navigator presents titles in a catalog format, making it first choice among public librarians for standing order title selection.

Electronic Lists
Baker & Taylor also offers the following Internet-based resources for title selection:

E-Lists
Baker & Taylor’s E-lists are electronic selection lists covering popular genres, industry current events, and
titles in high demand. Designed with your needs in mind, these lists will not only save you valuable research time, but, combined with our convenient and integrated Internet ordering feature, you can receive product faster than ever.

Please visit our website, www.btol.com, to access E-Lists.

**B&T Express Wired**
Please see our website (www.btol.com) featuring B&T Express Wired, the first source for pre-publication book information. Every other week, Baker & Taylor brings to you all of the big titles – big print runs, bid publicity budgets. The site details information including title, author, ISBN, and list price as well as anticipated publication date, print run, and ad budget. Join us twice a month for a listing of the biggest and brightest!

**First Look**
Baker & Taylor’s First Look is a FREE Collection Development program that features automatic monthly notification of new and forthcoming titles. First Look is available to customers who subscribe to Title Source II on the Web. Each month your Title Source II Administrative Account will automatically receive a new cart containing an up-to-date title list. First Look includes both Children/Young Adult and Adult titles. Orders may be placed directly from the list, saving your library staff valuable time.

**First Look Review**
First Look Review is a paid-subscription Collection Development program that features a monthly, review driven notification service. First Look Review is available to customers who subscribe to Title Source II on the Web. Each month a new cart will be automatically added to your administrative account containing an up-to-date title list, with reviews, for that month. Orders may be placed directly from the list, saving your library staff valuable time.

These lists contain both adult and Children/Young Adult material.

**7. Do you offer an electronic system for placing orders and performing related services?**

**B&T Link Online (Free of Charge)**
Baker & Taylor’s website, www.btol.com, allows our customers to search for titles and place orders via the Internet. Features include the ability to:

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

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

**Title Source II (Subscription Product)**
Baker & Taylor’s *The Title Source II* is the most extensive database of bibliographic acquisitions information for U.S. publications. This database includes book, spoken word audio, video, DVD, and Music CD titles. The database may be searched by keyword, title, author, ISBN, Approval subject descriptor, Dewey or LC classification, LC subject heading, publisher, or general subject code. Searches may be further narrowed by considering price, binding, print status, and date parameters. Each record gives current print status (i.e. Not-Yet-Published, Out-of-Print), stock level information, latest list price, and estimated discount price.
Our proprietary database contains detailed, comprehensive, up-to-date information on over 3.5 million book titles, 85,000 video titles, and 240,000 music titles. In addition, it contains over 500,000 annotations, 275,000 book covers in full color, 45,000 book reviews and 88,000 tables of contents.

TSII offers a means to search for titles, make selections and order titles electronically, with confirmation. Selected titles and ordered titles may be stored in an electronic “cart” to provide an order history. Order confirmation may be downloaded into EXCEL or ACCESS.

Please see the enclosed brochure for additional information.

As part of Baker & Taylor’s comprehensive bid proposal, we are pleased to offer Title Source II to the members of SWING for an annual fee of $1,450.00 per member. Additional user ids may be purchased for $250.00 per id. If a Member is currently subscribing to this service, this new subscription rate will be available at the point of subscription renewal.

**Ordering - Continuation Services**

Baker & Taylor can accept orders via mail, phone, fax, or via COMPASS, our online Continuation Services website. Please see Exhibit E for details on standard ordering methods and Exhibit F for information regarding our COMPASS website.

8. **Do you support online order transfer from the local library’s acquisition system?**

**Electronic Ordering**

Electronic ordering is available via modem, internet e-mail, or FTP. Additionally, Baker & Taylor has developed interfaces with most major automation systems.

Baker & Taylor has expanded the available interfaces and file formats that can be used to place electronic orders. There are more options than ever from which customers may choose to interact with their purchasing and/or acquisitions sub-systems. We are committed to expanding these offerings even more to make Baker & Taylor the most accessible vendor for electronic ordering, no matter what methodology you prefer. We have added a powerful EDI translator to our Electronic Ordering Systems. This has allowed us to add the X12 and EDIFACT EDI standards acceptable formats for purchase orders and purchase order acknowledgements. We also accept orders and deliver acknowledgements using FTP or Internet Email. Electronic ordering is available with most major automation systems including: DYNIX, Horizon, Scholar, Best-Seller Library System, Bib-Base, CARL, LIBRIS 2020, CLSI PLUS, DRA, Gaylord, GEAC Advance, Ingram Flashback, INLEX, Innovative Interfaces, MATSS, Nonesuch, SIRSI Unicorn, Voyager, VTLS and Winnebago LAMP.

Please see Exhibit G for a listing of vendor interfaces and their capabilities. Please contact your Sales Consultant should you have any additional questions.

12. **Do you offer continuation service for serial books?**

Baker & Taylor has been servicing over 6,000 libraries worldwide with our continuation services program for over 40 years. Our continuation services program will offer to the members of SWING a database covering 40,000+ series representing in excess of 250,000 titles. These include numbered and unnumbered monographic series, proceedings, non-subscription serials, sets in progress, selected U.S. government documents, and publications of the United Nations, and other international agencies as distributed in the U.S.

Baker & Taylor’s Continuation Services (CS) program also features Compass, a web-based product, which will enable the members of SWING to access the CS program on the Internet! Using Compass, librarians can now reduce time consuming phone calls and paperwork by modifying profiles, creating bibliographic
searches, submitting claims, and developing management reports on-line, 24-hours a day. Please see Exhibit F for additional details.

13. Do you offer leasing programs for books, audiobooks (CD or cassettes), music CDs, or video recordings (DVD or VHS)?

Lease programs are available for popular and computer book materials.

Baker & Taylor’s Book Leasing Program provides libraries with an efficient and economical method for maintaining an inventory of the most current titles, titles that patrons demand. Our staff of professional book buyers selects titles for this program based upon reviews and anticipated general public demand. Each month, prepublication title lists are created with comprehensive annotations to assist the library with selections. Annotations include information on authors and titles, as well as information on planned promotional tours, print runs, book club selections, and media tie-ins.

Additionally, our Quick Call publication lists current bestsellers available through our Lease Program. These titles are available in-stock, and are ready for 48-hour shipment.

Special requests are also welcome. Requests for hardcover Trade titles not listed in our publications will be reviewed, and, if possible, will be added to your order.

Cataloging and processing, including MARC records and barcodes, are available. Books will arrive fully processed to meet your specifications, all at no additional charge. (Standard processing includes a Mylar jacket, book pocket and card, spine label, and a full card set, along with a red Book Lease ID sticker and a library identification label.)

Core Collection
Your program begins with a Core Collection, selected from our inventory of circulated books. (*Core Collection is 10 times the monthly quota allowance*). In lieu of this collection, the library may choose to receive one month’s quota free, to begin building the basic collection. Books selected during additional months will be retained by the library, with no rotation, until the library reaches the standard inventory level.

Quota Information
A book will count as one (1) against the quota allowance, unless the publisher’s list price is higher than the quota price limit.

To more fully accommodate the needs of the library, Baker & Taylor allows for 12 full months of quota (some other lease plans may actually limit the library to half months of quota in July and December).

Additionally, quota may be carried over to, or, borrowed from, the next month’s allowance to assist the library in meeting high patron demand.

Collection Rotation
The library is encouraged to rotate the collection throughout the year by keeping two books (free) for every ten books returned. This builds the library’s permanent collection with proven, popular titles. At any time during the lease period, the library may purchase titles from the collection at a 75 % discount off of the publisher’s list price. Special promotional sales are offered periodically.

Reporting
Baker & Taylor Book Leasing System’s inventory report is the easiest to use in the industry today. We provide a report of account activity on a monthly basis. No additional charge is assessed for lost, stolen, or damaged books. These books are simply reported via the inventory listing, and the library's records are
updated to reflect the activity. Books which are publisher defective or damaged in shipment will be replaced at no charge.

14. Reports: Describe the types and formats of reports that can be generated, schedule for supplying routine reports, list any costs, and include sample copies.

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

Information is retained in OCS for 90 days after invoice. Please see our website and the enclosed brochure for additional details.

Please see Exhibit H for samples of the following reports available from Baker & Taylor:

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

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

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

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

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

23. Shipping: Contractor shall specify how shipping charges, if any, will be determined and shall indicate estimate cost of shipping for dollar amount of purchase order.

**School and Public Library Firm Order Materials:** Book purchases and spoken word audio from Baker & Taylor will be delivered F.O.B. Destination (FREE SHIPPING) from your primary Baker & Taylor service center located in Commerce, Georgia.

**Academic Firm Order Materials:** Book purchases and spoken word audio from Baker & Taylor will be delivered F.O.B. Destination (FREE SHIPPING) from your primary Baker & Taylor service center located in Momence, Illinois.

**Continuation Services Program Materials:** Delivery of Continuation Services’ Titles will be F.O.B. Destination from Baker & Taylor’s primary Continuations’ Service Center located in Commerce, Georgia. **Shipping will be Free of Charge.**
Audio Visual Materials: Purchases of audio visual materials from Baker & Taylor, Inc. will be delivered F.O.B. Destination (FREE SHIPPING) from your primary Baker & Taylor audio visual service center.

Staff Accounts: Baker & Taylor offers staff accounts as a courtesy to our customers for personal use. These accounts will receive the same discount terms, however, these accounts will receive F.O.B. Shipping Point, Charge shipping, and will be taxed as appropriate.

ATTACHMENT C – Pricing for Offer Consideration

Paragraph 5
We do not, as a rule, supply copies of publisher invoices to customers; however, upon request, we would provide that information from a publisher invoice that relates to a specific title in question. Not all publisher invoices are retained by Baker & Taylor after the information is entered into our computer system; therefore, not all invoices will be available for review.

Baker & Taylor cannot guarantee public performance rights for video products unless those rights are extended to us by the original copyright holder. However, all video / DVD purchased from B&T can be used in the following situations:

1- to circulate to library patrons or students for viewing at home
2- in “face-to-face” classroom situations

Section 110(1) of the Copyright Act clearly exempts use in “a classroom or a similar place devoted to instruction” from copyright infringement, even though tapes may be marked “For Home Use Only”.

Please see Exhibits A, B, and C for complete details of Baker & Taylor’s Pricing Offer.

The exceptions to the discounts quoted would be those books where Baker & Taylor has proprietary media or special programs such as our Approval Program, Replica Book Services, and any Opening Day Collection, or Collection Enhancement Project. DEMCO Turtleback editions will be billed at Baker & Taylor’s advertised net catalog price. Replica Books will receive a 5.0% discount from our advertised list price. BTBound titles will be billed at a discount off of our advertised list price as stated on Exhibit A. Imported Foreign Language titles noted as non-returnable will be billed at our advertised list price. Further information and pricing regarding such services and programs are available upon request.

The discounts outlined within this proposal are taken from the publisher’s current list price at the time of shipment. Please note that the publisher’s list price is subject to change without notice. In addition, please note that for some college textbook publishers where no publisher list price is assigned by the publisher, Baker & Taylor will assign a list price for these titles. In such instances, the applicable list price is based upon a standardized formula that considers list prices of similar books offered in the marketplace.

This agreement affords the provision of books based upon stated discounts from the publisher’s current list price. The discounts vary based on the classification of books into general categories, some of which are determined by general marketing criteria. Baker & Taylor has utilized its best efforts to categorize books for pricing purposes by considering such factors as: binding, cost of acquisition, general marketing categories, publisher’s discount, customer demand, returnability to publishers, and other factors. Baker & Taylor reserves the sole right to be the final determinant of the pricing category. Please be advised that Baker & Taylor provides a detailed invoice that identifies the current publisher’s suggested list price, the discount offered, and the exact price charged for each title ordered.

As part of our proposal, we have enclosed a copy of the The Title Source on CD-ROM. This collection development and bibliographic data resource is recognized by librarians and booksellers worldwide as the
premiere authority to search and access more than 3.5 million unique titles. SWING may wish to utilize The Title Source in order to view specific titles. For your convenience, we have outlined the proposed discounts, along with their associated Baker & Taylor Price Indicators so that you may load them onto the CD-ROM. Please see Exhibit A for complete discount schedules.

To assist in using the enclosed The Title Source on CD-ROM as a reference tool, we have enclosed a packet of information along with the CD-ROM, which will provide instructions on how to load and use the CD-ROM. We are also providing you with the following password, so that you may access the title information on the CD-ROM. The password is URYRTTVQ. This password will remain in effect through the end of August 2003. If you need assistance with the installation or use of this product, please call B&T’s Technical Support Department at (800) 775-3700.

CONCLUSION

Should you require any additional information regarding any products or services available from Baker & Taylor, please contact me or our Information Service Department at (800) 775-1800.

Please provide an award notification and tabulation of results for this solicitation either via fax or mail to address listed below:

Baker & Taylor, Inc.
Attn: Pricing Services
2709 Water Ridge Parkway, Suite 500
Charlotte, NC 28217
Facsimile: (704) 329-8989

We are looking forward to a favorable reply to our offer and to the opportunity to be of service. Your account profiles will be updated to reflect the terms of this contract, upon receipt of award notification.

Thank you for considering Baker & Taylor’s services.

Sincerely,

Stefanie Shute
Pricing Services Representative