



# MISSION VIEJO

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**Request for Proposal:  
Technical Services Outsourcing  
for Mission Viejo Library**

**Due: Tuesday, April 30, 2024  
3:00 p.m. (PDT)**

**Submitted by:**

**INGRAM<sup>®</sup>**

**One Ingram Blvd., La Vergne, TN 37086-1986**

**[www.ingramcontent.com](http://www.ingramcontent.com)**

**[REDACTED]**



April 26, 2024

Genesis Hansen, Director of Library and Cultural Services  
Mission Viejo Library  
100 Civic Center, Mission Viejo, CA 92691  
(949) 830-7100, ext. 3076

**Re: Request for Proposal: Technical Services Outsourcing for Mission Viejo Library**

Dear Ms. Hansen,

Thank you for considering Ingram Library Services LLC as a prospective vendor for the Mission Viejo Library's Request for Proposal for Technical Services Outsourcing for Mission Viejo Library.

Ingram has been working with the Mission Viejo Library since 1997 and our goal is to continue this partnership as the Library's primary book vendor.

We have dedicated teams in and across each Ingram department to continue giving the Mission Viejo Library direct, thorough, ongoing assistance for the continued success of all its projects and needs. Within this proposal, we have outlined Ingram's extensive Collection Development Services, including relevant, quality resources, many of which, such as iCurate Complimentary — our hand-selected High Interest Category Lists and Standing Order Programs — are free of charge.

We also have the industry's largest inventory, bar none. With an unmatched on-hand stock of over 19,000,000 unique titles and 35,000,000 books, representing over 30,000 book publishers and 57,000 imprints, we ensure the highest fill rates in the business. Ingram's proximity to the Mission Viejo Library enables Ingram to ensure fast turnaround times on delivery.

Ingram would like to be instrumental in supporting the Mission Viejo Library's vision — to be recognized as a premier resource for educational support through self-directed learning and literacy. We can continue to deliver the library materials you need to help make the Library a welcoming community gathering place and a cornerstone of family, education, cultural, and civic life.


Please contact Kate Collingwood, Contract Management Specialist, at (615) 213-5736 if you have any questions about Ingram's proposal. She can also be reached by email at [ilsbids@ingramcontent.com](mailto:ilsbids@ingramcontent.com).

Best regards,

A handwritten signature in black ink that reads "Carolyn Morris".

Carolyn Morris, Vice President  
CM/kc

**Proposal Form - Submittal #1: Certification**  
**Mission Viejo Library Request for Proposal for Technical Services Outsourcing**

<b>Firm Name:</b>	Ingram Library Services LLC
<b>Firm Address:</b>	One Ingram Blvd., La Vergne, Tennessee 37086
<b>Contact Name:</b>	Kate Collingwood, Contract Management Specialist
<b>Contact Phone:</b>	(615) 213-5736
<b>Contact Email:</b>	ilsbids@ingramcontent.com
<b>Contact Fax:</b>	(615) 213-6004
<b>If Partnership, Name(s) and Address of Partners:</b>	
<b>If Corporation, State of Incorporation:</b>	Tennessee
<b>Proposer certifies that he has read and will comply with the Mission Viejo Library provisions and procedural requirements stated in the Request for Proposal. In the event that only one Proposal is received, MVL may require that the proposer submit a Cost Proposal in sufficient detail for the City of Mission Viejo to perform a cost/price analysis to determine if the bid price is fair and reasonable.</b>	
<b>Authorized Representative Submitting Proposal</b>	
<b>Name:</b>  Carolyn Morris	<b>Title:</b>  Vice President
<b>Signature of Authorized Representative:</b>  	<b>Date:</b>  April 26, 2024

## **Proposal Form - Submittal #2: Questions**

### **1. Ingram's Qualifications and Experience**

Ingram Content Group LLC is part of the long tradition of successful companies built by the Ingram family of Nashville, Tennessee. Dedicated to helping content reach its destination by providing a broad range of physical and digital services to the book industry, Ingram Content Group has been a partner to librarians, educators, publishers, and booksellers for over five decades.

Ingram Content Group has provided books, in all their formats, to customers and readers around the globe, including more than 13,000 valued library customers and more than 17 million library patrons. Ingram Library is the preferred materials and services source supplier, with 25 offices and distribution centers globally.

Publishers rely on Ingram Content Group as a key provider of demand-driven print, digital, and marketing solutions. We provide reliable, cutting-edge responses to the questions our publisher partners have about the ever-changing opportunities in the book industry. No single source other than Ingram has comparable experience, expertise, and connectivity in bringing supply chain management, and print and digital solutions to the market.

Ingram is a privately held, family-owned corporation operating under the same ownership since our inception. The Ingram family is actively involved in the day-to-day operations of our company and has a vested interest in our customers' satisfaction.

The Ingram Content Group is led by John Ingram, Chairman of Ingram Content Group LLC, and Chairman of the Board for Ingram Industries Inc. John joined Ingram Industries in 1986 and held several key positions with Tennessee Book Company and Ingram Book Company before being named Chairman & Chief Executive Officer of Ingram Content Group. John was named Chairman of the Ingram Industries Inc. Board of Directors in April 2008, after having served as Vice Chairman of the Board for nine years.

A tremendous advantage of being a family-owned company is the history and stability of ownership backing our long-term plans to remain the number one book vendor and service provider in the library market.

The Ingram vision is to be the premier services provider in and around the distribution, production, storage, creation, discovery, and assembly of content. To bring that vision into reality, Ingram Content Group has multiple operating units, each focused on a specific area of the book industry, such as retailers, publishers, educators, and libraries.

Those operating units are Ingram Book Group LLC, including Ingram International and Spring Arbor Distributors®, Lightning Source LLC, Ingram Library Services LLC, Ingram Publisher Services LLC, and Tennessee Book Company LLC. All Ingram Content Group companies operate under a single mission to help content reach its destination, and they uphold the same 5 values: to be Credible, Performance Driven, Agile, Innovative, and Customer Focused.

### **Ingram Library Services LLC**

To better support the unique needs of libraries, Ingram Library Services grew from a specialized department of Ingram Book Company in 1970 to a full-service library vendor. Because of our growth and success, Ingram Library Services incorporated in 1998 as a subsidiary of Ingram Industries Inc. Today we offer "one-stop shopping" for our library customers.

Ingram provides librarians with immediate access to the largest selection of books, spoken word audio, DVD/Blu-ray titles, music CDs and other book-related products in the industry. Our full range of library value-added services includes comprehensive Collection Development support, Standing Order and Continuations programs, as well as shelf-ready cataloging and processing services customized to the library's specifications for print materials.



As an Ingram Content Group company, Ingram Library offers a full range of content and services. With over fifty-five years of experience in distributing library materials, we serve libraries like MPL with a wide range of collection development, processing, and cataloging services guaranteed to enhance your collections.

**Ingram Library Services' sole focus is on libraries.** We have a highly successful track record of providing a full range of content and services and shelf-ready materials to libraries of all sizes across the U.S., including large, multi-branch libraries for over 40 years.

We have over 4,000 customers who use our cataloging and/or processing services for ongoing firm orders, standing orders, and special projects including Opening Day Collections.

Ingram Library Services LLC is headquartered in La Vergne, Tennessee, where our Sales, Customer Care, Collection Development, Custom Cataloging and Processing, and Executive and Sales staffs are located.

Ingram Library Services LLC  
One Ingram Blvd.  
P.O. Box 3006  
La Vergne, TN 37086-1986  
(615) 793-5000  
[ilsbids@ingramcontent.com](mailto:ilsbids@ingramcontent.com)  
<http://www.ingramcontent.com/pages/libraries.aspx>

Official Representative: Carolyn Morris, Vice President

#### **Ingram Staff**

Ingram Content has a staff of more than 4,800 associates who may be involved in providing service under this contract, including Customer Care, Product, Operations, Transportation and Shipping, and Warehouse Associates who pick and pack orders.

Our library experience and continuing infusion of new staff with fresh outlooks, enables Ingram to design innovative solutions with fundamental expertise in areas such as automation, collection development, cataloging, processing, all the way through to transportation. Ingram Library Services will give the highest priority to your needs by assigning key Ingram professionals to work with the Library to meet and exceed all goals and standards set forth in this proposal.

**Ingram has 39 master's-degreed librarians on staff.** They all have years of experience working in and with libraries, and the Collection Development librarians have a minimum of five years of collection development experience in public libraries. The Mission Viejo Library will be assigned a designated technical services associate to be its primary point of contact for cataloging and processing requests.

#### **Customer Care**

The Library can expect the ongoing involvement of your existing Ingram Sales and Inside Sales Representatives, who provide open communication between the Library's staff and all Ingram departments, including ordering, processing, shipping, invoicing, and Collection Development. They are available to set up any in-person meetings or calls needed to review and discuss all project goals, processes, and schedules.

Customer Care is based in our Tennessee headquarters, where representatives have immediate access to senior and management staff for service issues requiring escalation and further investigation. By integrating our Library Customer Care team with other Ingram Content groups, we can best apply our systems, training, and experience. From a Customer Service perspective, the team has a full support infrastructure to help provide our customers a consistently high caliber of service.

Ingram's team of Customer Care Support Specialists, trained specifically on the requirements of library contracts, are available five days a week. Customer Service hours of operation are Monday through Friday, 7:30 a.m.–5:00 p.m. (Central Time). We try to respond to all inquiries within 24 hours (during normal working hours). However, some issues may require further investigation to provide accurate information and optimal service.

To reach Ingram Library Services dial **(800) 937-8200**. You may contact your Representatives directly at:

Sales Representative ..... (801) 999-8404

Inside Sales Representative ..... (615) 213-5786

Sales Manager / Western Region ..... (724) 953-9807

[ILSCustomerservice@ingramcontent.com](mailto:ILSCustomerservice@ingramcontent.com)

For swift resolution to cataloging and processing issues, please direct correspondence regarding to our Account Services team at [requirements@ingramcontent.com](mailto:requirements@ingramcontent.com). Account Services hours of operation are Monday through Friday, 7:00 a.m.–4:00 p.m. (Central Time). We make every attempt to respond within 24 hours (during normal working hours) from receipt of correspondence. However, some issues may necessitate further investigation to provide the best service and most complete response to the Library.

#### **Ingram Senior Management Staff**

Ingram Library Services' Senior Staff members will serve in both advisory and hands-on capacities to ensure that the contract runs smoothly from start to finish. Titles and brief job descriptions of key positions are included.

**Vice President, Ingram Library Services:** Oversees and leads Sales, Marketing, Technical and Value-added Services and our Collection Development Team with a unique 360-degree library perspective for the Public and K-12 Libraries.

**Director of Library Operations:** Manages the Bids and Contracts, Sales Analysis, and Account Services Development teams.

**Director of Collection and Metadata Development:** Leads the Collection Development and Cataloging teams of librarians and expert administrators, creating and providing services to help customers discover titles, balance collection, and get titles into the hands of patrons.

**Manager of Credit for Libraries:** Upon notification of award and establishing any required accounts for the Library, assigns a Credit Representative for your account.

**Vice President of Customer Care:** Based in our Tennessee headquarters, with immediate access to all Executive Staff for any service issues requiring escalation. Together with the Supervisor of Customer Care, the Customer Care team will handle any issues that may arise with the Library's accounts.

#### **Sales Support**

**Director of Sales** has spent 14+ years leading sales teams in the library industry providing physical and digital formats in the public library space. An executive with an extensive background in leadership and sales management, the Director of Sales is committed to continuous improvement and creating collaborative relationships with Ingram's customers.

**Senior Sales Representative:** Serves as the primary contact for all Ingram services. Provides an on-site relationship to monitor progress and trouble-shoot potential issues, making selection, ordering, and receiving materials simple and hassle-free.

**Inside Sales Representative:** Assigned to the Library to provide an additional level of sales support.

**Manager of Inside Sales** has 8+ years of experience assisting Ingram's library customers. Leads a team of Inside Sales Representatives that dedicate their time to supporting Public, K-12, and academic libraries.

#### **Library Technical Services and EDI Staff**

**Senior Manager, Technical Services:** Oversees the Library Account Services and Client Integration teams.

**Manager of Opening Day Collections:** Serves as the primary contact and project manager for all opening day/special projects and facilitates all aspects of customer's project from an account profile setup and operations standpoint. They work closely with all internal stakeholders to help move projects forward to successful implementation.

**Supervisor of Account Services:** Oversees the Account Services team responsible for establishing and maintaining all accounts, including ensuring customers' cataloging and processing profiles are correctly and promptly entered into our BookMARC cataloging system. Once the Library's accounts are established and orders are successfully proceeding, they become the Library's primary contact for cataloging and processing matters.

**Cataloging Services Manager:** Serves as the central cataloging expert for Ingram Library Services, and coordinates with the Sales, Account Services, EDI, and Client Integration teams to help translate customers cataloging requirements into Ingram processes.

Ingram's Cataloging Department is comprised of professional MLS-degreed catalogers and paraprofessional staff experienced in working with all major integrated library systems. Ingram's staff of professional and paraprofessional catalogers work only on cataloging, so that they have increased efficiency and expertise.

**Manager of ILS Systems** is the point of contact for setting up your ILS System connections and all our EDI Service offerings.

**EDI Support Specialist:** Assists in establishing and maintaining EDI ordering streams, as well as helping to resolve customer issues involving EDI, ipage, and interfacing with library automation systems.

#### **Collection and Metadata Development Staff**

**Director of Collection and Metadata Development:** Manages a staff of eight librarians responsible for creating lists for ipage, Opening Day Collections, iCurate *Coming Soon*, iCurate *Core*, iCurate *inClusive*, the hand-selected New Title Notification/Standing Order Programs, ongoing custom lists, and more.

**Collection Development Analysis Manager:** Supports the Collection Development team through managing and analyzing data, report creation, processing customer holdings data, and pulling relevant product metadata for ODC lists. Also manages the iCurate *inClusive* service.

**Supervisor of Cataloging:** Supervises a staff of 10 cataloging librarians responsible for creating original MARC records and upgrading other records. They also work with the processing and development teams to ensure customers receive accurate records and processing on their materials on time.

#### **► A statement as to the vendor's ability to conform to the shelf-ready cataloging and processing requirements of MVL, as specified in Appendices A, B, and C.**

Ingram can comply with the shelf-ready cataloging and processing requirements outlined in this RFP, for print materials. We can provide audiovisual materials, but Ingram does not currently offer cataloging and processing for audiovisual materials.

Ingram's Account Services team will work with the library to ensure understanding of all specifications and address any anomalies. MLS-degreed cataloging librarians and veteran processors will adhere to your exact specifications throughout a custom-made setup process so that all titles arrive shelf-ready exactly as needed for immediate circulation.



### **BookMARC® Cataloging**

Ingram provides access to full-level MARC records through BookMARC, the proprietary Ingram cataloging database. BookMARC includes records from the Library of Congress and OCLC, as well as tens of thousands of entries created by Ingram's MLS-degreed catalogers.

Ingram cataloging is in accordance with the latest editions and versions of the Anglo-American Cataloging Rules/RDA, MARC21 Format, OCLC Bibliographic Formats and Standards, Library of Congress Classification Schedules, Dewey Decimal Classification, and Library of Congress Subject Headings. Ingram cataloging is consistent with LC rule interpretations and cataloging practices.

If standard BookMARC cataloging does not meet the Library's needs, Ingram offers a full array of custom cataloging options. Services include:

- Searching for added copy in the Library's ILS utilizing Z39.50 protocol (minimum spend may apply)
- CIP, OCLC, or other Level 5/7 records can be brought up to FULL AACR2 / RDA / MARC 21 standards by an MLS-degreed cataloger.
- Where existing or derived records are unavailable, an original cataloging record can be created by an MLS-degreed cataloger.
- If the Library requires OCLC Holdings Updates, Ingram can provide this service with an OCLC Data Sync Collection.

### **► A statement as to the vendor's present ability to interface with the Symphony automated library system for electronic selecting, ordering, cataloging and invoicing.**

Ingram is experienced in working with all major Integrated Library Systems, including Symphony. Ingram supports EDI Transaction types and formats based on the capabilities of the library automation system.

The Mission Viejo Library is currently set up to receive Enriched EDI services from Ingram, including selecting, ordering, cataloging, and invoicing.

### **EDI**

Ingram supports EDI Transaction types and formats based on your automation system's capabilities. Ingram EDI offerings include:

- Electronic ordering using the X12 or EDIFACT format and FTP for communications.
- Enriched EDI ordering.
- Text format full order confirmation via email from Ingram email to user-specified email address.
- Purchase orders are created in your Acquisitions department and sent to Ingram via FTP.
- Ingram processes orders and places electronic confirmation files on the Ingram FTP server for customer retrieval.
- For customers opting to receive electronic invoices, Ingram places electronic invoice files on the Ingram FTP for customer retrieval. E-invoices streamline workflow and increase efficiency. Ingram can provide paper invoices to e-invoice users *if requested*.

### **Enriched/Enhanced EDI Order**

This enhanced order transaction allows users to send additional distribution information in the EDI order record, which provides information necessary for Ingram to create complete holdings records to match items shipped. The holdings records are loaded with MARC bibliographic records and overlay the on-order items. When Ingram sends materials to your location, they are shelf and circulation ready.

With Symphony:

1. Ingram can accept EDI orders from the Symphony System in the X12 format. Our order management system processes orders sent via this method.
2. Ingram accepts ISBN13 and ISBN10 in EDI orders. However, we do not process orders using UPC or ISSNs as we do not process orders for magazine material.
3. If you use the Symphony system, you can send branch, location, and item type codes. Some customers (in lieu of sending one of these enriched fields) will replace it with their holding codes as this is a unique code value for each collection. We use this enriched data to drive cataloging and processing outputs.
4. Ingram can accept call numbers.
5. Symphony customers send a line-item P.O. number for each title they order. Ingram stores this number in our system and uses it as a match point in EDI acknowledgments and invoice transactions. In addition, the acknowledgement/confirmation that gets posted to our FTP server. Ingram can also set up a customer to receive text formatted email confirmations.
6. Ingram can receive control numbers in an enriched EDI order from a Symphony customer. Some customers use this as a match point to overlay order records.
7. Customers using the Symphony System can grid the notes field in ipage to download in their order records and this can be sent in their EDI order as well Ingram does not do anything with this information.

## 2. Inventory

Ingram leads the industry in maintaining an **on-hand inventory of over 19,000,000 unique titles, representing more than 30,000 book publishers and 57,000 imprints**. Our unmatched stock of over **35,000,000 books** ensures the fastest and highest fill rates in the industry.

- Ingram's on-hand inventory represents the largest range of publishers in the wholesale distribution business today. We stock not only new bestsellers and award-winning titles, but also the deepest inventory of midlist and backlist titles of any vendor.
- Ingram provides adult, young adult, and juvenile fiction and nonfiction titles in all subjects in a variety of bindings, including trade hardcover, trade paper, mass market paper, large print, short discount and small press, university press, single library editions, publisher's library editions, graphic novels, board books, easy readers, picture books, pre-bound books, and big books.
- Ingram provides reference, scientific, medical, technical, legal, and other academic and non-trade titles, including materials from university and association presses, small presses, and specialty publishing houses.

### Audiovisual Inventory

With **70,000+ DVD** and **19,000+ Blu-ray titles**, Ingram offers one of the most comprehensive inventories of DVDs in the country. Ingram represents more than **500** video suppliers with titles in categories such as popular box office, foreign and independent films, and family films. We also provide an extensive line of nonfiction and children's titles.

Our spoken word audio inventory includes **290,000+ titles**, including abridged and unabridged editions including CD, MP3, and pre-recorded audio player formats. We also inventory more than **700,000 music titles** on Compact Disc, from classical to popular titles.

Our video game inventory includes over **3,000 titles** from the following platforms: PlayStation 2, PlayStation 3, PlayStation 4, PlayStation 5, Xbox 360, Xbox One, Xbox Series S/X, Wii, Wii U, Switch, 3DS, PC.



### **Spanish and International Language Inventory**

Ingram's in-stock inventory of Spanish language titles is particularly strong, covering both translations and books originally published in Spanish. We actively work with Spanish language publishers to expand this catalog to meet growing reader demand.

Ingram currently inventories **over 330,000 unique Spanish titles**, for adults, teens, and children, with more than 30,000,000 units from 209 publishers available to order. We provide a limited number of spoken word audio titles in Spanish language. We also provide domestic video titles that have been dubbed or subtitled in Spanish and non-domestic Spanish video.

A few of Ingram's create-your-own New Title Notification/Standing Order Programs include a Spanish-language option, so customers can build multiple profiles to include Spanish language titles.

In addition, Ingram offers over **4,000,000 titles in world languages** ranging from Afrikaans to Yiddish. An additional benefit of our Lightning Source inventory of millions of print-on-demand titles is that many of these world language titles are available on an on-demand basis.

Inventory of International language books in the following languages:

- Spanish: 335,887
- Persian (Farsi): 2,030
- Vietnamese: 4,578
- Chinese: 26,344
- Korean: 3,287
- Japanese: 4,449
- Hindi: 12,742

### **3. How many publishers do you represent? Please enclose a complete list of those publishers supplied, or provide a Web link to a complete list.**

Ingram Library Services' inventory goes well beyond that of other library wholesalers because the company is part of the larger Ingram Content Group, which includes Ingram Book Company, Ingram Publisher Services, Ingram Spark, and Ingram Lightning Source. Each of these entities contributes to the strength of our stock position.

#### **Ingram Book Company**

As a leading supplier of books to bookstores and online retailers around the world, Ingram has established business relationships with publishers of all kinds. Eager to market their books to the vast retail market, these publishers alert Ingram to new releases before they are published and offer a wealth of information about each title both in automated feeds and through meetings with our team of buyers.

Our predictive ordering software then takes over and continuously ensures that each title is stocked appropriately so we have books on hand when you need them. The volume of sales to retail outlets financially supports running our library business out of 5 warehouses located across the country, and it enables us to automate our distribution facilities to provide the fastest fulfillment in the industry.

#### **Ingram Publisher Services**

Ingram Publisher Services represents more than 850 publisher clients and more than 4,400 imprints from around the world. These publishers enlist Ingram to be the exclusive distributor of their products. The advantage this brings to our library customers is the guaranteed availability of current titles from these publishers at Ingram distribution centers.

### Ingram Spark

Gain access to custom curated content lists from Ingram's award-winning indie platform IngramSpark. Exclusively provided by IngramSpark Distribution services and featuring:

- Indie books with enhanced product metadata, consumer visibility and marketing
- Top selling titles from 60,000+ indie publishers and authors
- Customized and-curated lists of trending and timely books
- Over 300,000 books available for distribution
- Library-friendly terms guaranteed to make purchasing simple

### Ingram Lightning Source

With national and international facilities, Lightning Source has a virtual inventory of over 17,000,000 titles representing more than 145,000 publishers. We print only what is needed to meet our customers' current demand-whether that's a single book or 10,000 units. We make it possible for low-volume titles to stay in print and for new titles to be released. In addition, we offer print on demand for both paperback and hardcover titles. All this translates into wider title selection and better customer service for your patrons and your community.

Lightning Source and Ingram Publisher Services titles are listed in ipage, and you can order them using the same methods available for Ingram titles. There is no need to use a separate account or purchase order.

We have included a full list of publishers on the enclosed flash drive.

#### 4. What criteria is used to determine "demand/popularity" in your online interface?

The Ingram Library Services' Collection Development team focuses only on services for libraries but has the additional advantage of onsite interaction with the Ingram Content Group associates responsible for ordering materials sold through for our distribution centers. This collaborative approach to collection development, utilizing the knowledge of our buyers and our connection to publishers, results in our Collection Development Librarians having advance notice of forthcoming and potentially trending titles.

We meet with large and small publishers throughout the year to learn about forthcoming titles, publicity, and other important publisher news. And, because Ingram is the main provider of books to bookstores, large retail stores, and online booksellers, we can generate reporting that identifies "hot" titles before they become popular in libraries.

Ingram also provides a build-your-own, customizable standing order program called iSelect®. The iSelect Program is based on Ingram's buying level of pre-publication titles. Ingram's buy levels reflect predicted popularity.

The Ingram Top Demand list is available under the "Customize my Homepage" button in ipage and can be customized to show hardcover or paperback, fiction or nonfiction, and different audiences and genres.



Many of our complimentary lists on iPage feature new and forthcoming titles, including High-Interest Title Selections (HITS) and Top Library Titles, for each age group, featuring the titles we expect to be most popular.

**5. Do you provide electronic selection databases (e.g. iPage, BIBZII.com, Title Source 3)? Please describe how these services would be integrated with SirsiDynix Symphony electronic ordering. Is electronic ordering possible without a subscription to a selection database? What is the subscription cost of the selection database, and are there a limited number of users included in the subscription price?**

**iPage®** is Ingram's online collection development and ordering tool for librarians, combining the industry's largest inventory with complete title information, including pre-pub metadata, collection development resources, reviews, and real-time stock check. Customers with a current, active Ingram account are eligible for a free subscription to iPage, which offers libraries easy-to-use ordering capabilities and other features **at no cost for unlimited concurrent users**.

You can access iPage at <https://ipage.ingramcontent.com>. Via iPage, you can access and manage your library's account(s) specific information, at your convenience, **24 hours a day, 7 days a week**.



As a web-based tool, iPage offers 24/7 real-time inventory information, the ability to search by thousands of categories, as well as a wide array of publicity and product news sources. iPage features include:

- Simple search by Title, ISBN, Author, Keyword, Series, Dewey®, and more
- Ingram stock information and real-time stock check
- Title descriptions
- Physical Information, LC Subjects, LCCN, Dewey
- Ability to create, edit, download, and/or order lists by clicking titles within iPage, importing a document to iPage, or pasting EANs into iPage.
- Ability to sort by Author, Title, Binding, Dewey, ISBN, Price, Pub Date, Publisher, Standard Retail Price, Ingram Demand, and more
- For video product: additional Information such as Features, View, Number of Units in Package, Awards, Dewey, Based on the Book
- For video product: Advanced search by Directed By, MPAA Rating, and Featuring/Title
- For video product: Sort by Title, Featuring, Product Code, Format, Studio, Release Date, US SRP
- For music: Simple search by Title, Product Code/EAN, Artist, Song Keyword, and more
- For music: Sort by Album Title, Artist, EAN, Media, Label, Release Date, Suggested Retail Price.
- List sharing options
- Option to download brief MARC order records
- Ordering and order status information
- Account management and reports
- iPage selection lists created by Ingram staff librarians
- Current publicity information
- Online catalogs
- Annotations and citations
- Cover images for selected titles
- Power, Boolean, and Saved search
- Access to search all titles in our Extended database
- Excerpts for selected titles

- Journal review citations
- Full text reviews from selected journals for a nominal annual fee

Your ipage accounts are created so that a library-designated administrator has oversight capabilities to aggregate lists and manage users. The Administrator can add additional ipage users as required by the Library. Each user will be assigned a unique login, and users can set their own password.

We want ipage to be customer-driven and to **allow users to individually customize their ipage experience**. Users have tools to assist in prioritizing critical information they need to search, order, and deliver more content to more patrons.

Because ipage focuses on personalization and intuitive functionality, customizable widgets allow users to design their own homepage with tools they use most. Users can easily track bestsellers, access online catalogs, view custom lists, and bookmark favorite destinations in and outside of ipage.

### Holdings

Ingram's ipage platform has the capability to ingest library holdings and make those holdings visible as users navigate the ipage site. Users can quickly spot items the library already owned and make selecting decisions accordingly. Holdings appear in traditional search results, Ingram-generated lists (found under the iCurate tab), and in Library-created selection lists.

To show Holding's information, the library should provide us weekly "MARC out" holdings files, delivered via ftp. The file should be in either a .mrc or .out format. If interested in providing this data to Ingram so that it can be reflected in ipage for users in your account, please ask your ipage Administrator contact [ics-techsupport@ingramcontent.com](mailto:ics-techsupport@ingramcontent.com). There is no additional cost for this service.

### Electronic Ordering

In addition to ipage, Ingram also accepts electronic ordering via EDI (Electronic Data Interchange), and email attachment. Please see full details about EDI ordering and Symphony, above.

### 6. Do you require minimum copy orders for full discount advantage, or a minimum annual contract amount? If so, please describe.

We do not have minimum order requirements and we do not require an annual contract spend commitment.

### 7. Can you supply the following services?

- a) adult or young adult approval programs
- b) juvenile approval programs

While Ingram does not offer traditional approval plans, we do offer several new title Notification/Standing Order Programs, which are free of charge.

The Ingram Collection Development department curates, maintains, and manages 16 Standing Order Programs to help libraries easily track and order.

Ingram's Standing Order Programs have been ranked as the best in public library surveys and offer several advantages unmatched in the library market:

- **Convenient:** Enrollees can manage their profiles online through ipage 24/7, and any changes to the enrollment profile take effect immediately with no waiting.
- **Current:** Ingram librarians and administrators hand-select and maintain offerings to ensure programs include only active offerings. We know libraries do not want to encumber their budgets with titles that



will never publish because those titles are completed or discontinued offerings, so we meet and work with publishers continually to stay on top of publishing news.

- **Commitment-Free:** With Ingram, you do not receive titles unexpectedly in your library. Customers can enroll in either Auto-ship, which delivers a list to ipage and allows two weeks for editing before the order places automatically, or in Report Only, to receive lists, which they can edit and order on their own time schedule.

We order most titles 2-3 months prepublication (sometimes up to 6 months for the most popular authors), and you may cancel backorders at any time before they arrive in our warehouses. In addition, Ingram does not alter the return policy on titles ordered through our Standing Order or Continuation Programs—it is the same return policy no matter how you order or learn about the title.

- **Complimentary:** Ingram never reduces the discount or elevates pricing on titles running on a Standing Order Program. Our 16 Standing Order Programs truly are complimentary. There are no hidden costs.
- **Customizable:** Customers can mix-and-match Program profiles an infinite number of ways to ease their workflow and ordering process. They can rename any profile for easy identification and to prevent over or under-ordering.

For example, someone could enroll in the Author (Adult) Program, rename it Adult Fiction Hardcover, and select only the hardcover bindings of titles from authors they've chosen. They could then create a separate profile, rename it Adult Large Print, and select only large print formats of titles from their authors they've chosen on their profile.

Our Programs allow line-item grids, so if a library typically wants specific branch allocations and funding codes for the works of a specific author, and different branch allocations for the titles of another author, they simply select the correct grid for each offering in the enrollment form. When lists are delivered, the correct grids are already applied.

Although we encourage libraries to review their Program lists, many Author (Adult) and Nonfiction and Travel Continuations customers with line-item grids established simply allow lists to order automatically.

- **Customer Service:** Two long-tenured Customer Service Administrators provide special customer service for Standing Order Program customers. Although our Programs are organized and automated to allow most libraries to self-serve, our Administrators help libraries daily with everything from routine enrollment edits and cancelling or changing quantities on backorders, to onboarding new Standing Order Program customers or answering questions about why a specific title did or did not run on a Program.
- **Comprehensive:** Ingram provides 16 Standing Order Programs for Children, Teens, and Adults in multiple formats to cover the entire library:

#### **Programs—Adult**

**Author Fiction (Adult)**—Provides the latest hardcover (and large print & audiobook) releases from customer-selected bestselling adult Fiction authors—our most popular Program. Program runs twice a month and includes titles up to 6 months prepublication.

**Mass Market Genre Fiction (Adult)**—Gives customers the top five new titles each month in the Fiction genres they select, including: African American; General Fiction A, B, & C; Mystery A, B, & C; Romance A, B, C, D, & E; Speculative Fiction; and Westerns. Program runs once a month and includes titles up to two months prepublication.

**Nonfiction Continuations (Adult)**—Provides timely notification of regularly updated Nonfiction titles in a variety of subject areas from atlases to writing handbooks. If you don't want to receive a title every time a new edition releases, you can select a desired cycle. Program runs twice a month and includes titles up to four months prepublication.



**Nonfiction Series (Adult)**—Provides the latest series Nonfiction geared toward adults, including “For Dummies” and hundreds of others. Program runs twice a month and includes titles up to three months prepublication.

**Popular Series (Adult)**—Sends customers list of the newest and hottest titles from the popular adult Fiction series the customer selects. Program runs once a month and includes titles up to three months prepublication.

**ReviewALERT<sup>SM</sup> (Adult)**—Notifies customers of book reviews in their selected journals (Booklist, Kirkus, Library Journal, Publishers Weekly); can be limited by Dewey® Century, Fiction, and Graphic Novels to save time, as well as starred reviews, unstarred reviews, and all reviews. Program runs twice a month.

**Travel Continuations (Adult)**—Offers a flexible method of receiving regularly updated travel guide titles. If you don’t want to receive a title every time a new edition releases, you can select a cycle. Program runs twice a month and includes titles up to four months prepublication.

#### **Programs—Youth**

**Author/Illustrator (Children’s)**—Offers the newest titles by bestselling children’s authors and illustrators (ages 0-12). Program runs twice a month and includes titles up to six months prepublication.

**Author (Teen)**—Offers the newest titles by bestselling YA authors (ages 12-17). Program runs twice a month and includes titles up to six months prepublication.

**Easy Reader (Youth)**—Sends notification of the newest titles from customer-selected leveled beginning reader series. Program runs twice a month and includes titles up to three months prepublication.

**Nonfiction Series (Youth)**—Provides the latest series Nonfiction geared toward youth, including DK Eyewitness Books and hundreds of others. Program runs twice a month and includes titles up to three months prepublication.

**Popular Series (Youth)**—Sends customers lists of the newest titles from popular youth Fiction series. Program runs twice a month and includes titles up to three months prepublication.

**ReviewALERT<sup>SM</sup> (Youth)**—Notifies customers when titles receive a review in their selected journals (Booklist, Bulletin of the Center for Children’s Books, Horn Book Magazine, Kirkus, Publisher’s Weekly, School Library Journal); can be limited by industry standard age ranges and Graphic Novels and starred reviews, unstarred reviews, and all reviews to save time. Program runs twice a month.

#### **Programs—For All Ages**

**Awards\* Notables:** Offers new award winners and honor books, major book club picks, and state lists. Program runs the day after books are awarded/announced.

**Graphic Novel (Adult & Youth)**—Features expertly hand-selected and age-ranged Graphic Novel series. Program runs twice a month and includes titles up to three months prepublication.

**iSelect®:** Ingram’s own build-your-own Standing Order Program includes BISAC subject categories and sub-categories selected by the customer and is based on Ingram buy level; can also be filtered to view or exclude titles from specific publishers. Program runs every Sunday.

#### **8. Can materials be returned to vendor even after processing? If all cannot be returned, which ones cannot?**

Items with cataloging or processing per Library’s specifications are no longer in resalable condition and, therefore, are non-returnable, except due to Ingram error. If materials are received with cataloging and/or processing errors, Ingram will issue a credit.

Ingram’s Returns Policies provide prompt and efficient resolution for reporting and returning materials. A return authorization number is not required, though, in some cases as indicated below, we ask the customer to report returns to Ingram in advance. **Ingram cannot accept return of any product we do not stock or did not provide.**

### **Hassle Free Returns**

Libraries can return any unprocessed materials, as a "Hassle-Free" return, for up to 60 days after the invoice date.

- The library should include a copy of the Hassle-Free Returns form (found on the back of packing slip or printed from ipage) in each carton shipped to Ingram.
- Ingram will not charge a restocking fee for items returned in accordance with our Hassle-Free Returns Policy. Beyond the 60-day window, we may charge a restocking fee.

### **Non-Returnable Materials**

Each publisher decides whether their product is non-returnable. Publishers determine this on a product-by-product or binding-by-binding basis, or as items go out of print, and non-returnable items are indicated on ipage.

### **Overstock Returns**

Overstock returns are unprocessed materials returned after the 60-day window. We credit Overstock Returns at 50% off the list price, for standard discount books. Short-discount books receive credit at 10% less than original invoice price:

- Overstock returns are subject to a 10% restocking fee.
- Overstock returns for libraries may not exceed 10% of purchases made during the preceding 12 months.
- All product returned to Ingram must be in a marketable condition.
- Ingram reserves the right to send back, at the Library's expense, all products returned to Ingram in a condition in which they cannot be resold.
- To initiate an overstock return, customers can send the material(s) with the packing slip to the Ingram Return Center. Customers pay return freight for overstock items.

### **Hard to Find Books Alibris Returns Policy**

If dissatisfied for any reason with a book purchased through our Hard-to-Find Book program, you may return your purchase to the Alibris distribution center within 30 days for a full refund of purchase. Ingram reimburses shipping costs for returns when the book's condition is not as described on ipage.

Please email Ingram Customer Care at [ilscustomerservice@ingramcontent.com](mailto:ilscustomerservice@ingramcontent.com) to report a return. If the return is due to non-Ingram error, send the material to the Alibris Distribution Center.

### **Items Damaged in Transit or Shipped due to Ingram Error**

We ask the Library to accept delivery of materials damaged in transit.

Library staff should note product impairment on the carrier delivery receipt and then email our Customer Care Department at [ilscustomerservice@ingramcontent.com](mailto:ilscustomerservice@ingramcontent.com) for return instructions. If possible, please take pictures of items received damaged.

We cannot reimburse for claims made after 60 days from invoice date.

### **Defects — Books**

Ingram understands that defects inside a book may not be detected until after circulation, so there is no timeframe for returning product received with publisher defects. Eligible defects include the following:

- Missing pages
- Contents out of sequence
- Books bound upside down
- Contents different from that indicated on the cover/title
- Ink or printing issues

- Crooked pages
- Blank pages
- Malfunctioning disc
- Item received with missing or incorrect disc(s)
- Please note, however, that due to wear and tear circulation can cause, we accept books with broken bindings for up to 60 days after invoice date.

#### **Defects — AV Materials**

- Eligible defects can include damage or defects to individual discs in a multi-disc set. If the title is currently in stock, we offer the option to replace the entire product, rather than only the damaged discs, as Ingram does not stock individual replacement discs in our inventory
- Ingram recognizes that individual discs in a multi-disc title may be lost or damaged after the title is in circulation. Replacements for discs lost or damaged after receipt from Ingram may be available directly from the title's publisher. For example, Brilliance Audio Library Edition audiobooks offers a guarantee of free disc and vinyl case replacements. You can obtain publisher contact information for every title in ipage at your convenience, 24 hours a day, 7 days a week.

To report a discrepancy, complete and submit a discrepancy form via ipage. You can find the form under the "Help" tab. Once you have submitted the Discrepancy form, we will send a return label, if applicable, to your provided email, and issue a credit memo. You can then submit your replacement order of the item(s) as part of your next regular order.

#### **Credit Memo**

Upon proper notification and receipt of returned titles in our distribution center (if required by Ingram), we credit the customer for the full invoiced amount of the item(s). Credits appear on monthly statements, with reference to the purchase order number, and credit memos are visible on ipage.

#### **9. Are any subcontractors used in your cataloging and processing operation? If so, please list them, their relationship to you, and a brief description of their business and personnel.**

Ingram has trained Technical Services (Cataloging and Processing) and Collection Development staff already in place at our distribution centers that serve the Mission Viejo Library. We do not utilize subcontractors to provide these services.

#### **10. Other than the processing of materials as specified in Appendix B, are there other processing procedures you would suggest and are able to provide?**

Mission Viejo Library is currently profiled to receive processing services from Ingram. Upon award, we are happy to review your current services and discuss any changes the Library may wish to make.

#### **RFID**

To reduce costs as much as possible, Ingram's RFID standard is our pre-programmed RFID/Barcode sets. (Our pre-programmed tags are compatible with Bibliotecha, Tech Logic, ITG, Envisionware, etc.) The fee includes application of both barcode and programmed RFID tags. We can also include the Library logo in black and white or color on the tags at no additional charge. Using these sets ensures that all tags arrive at the Library programmed and for a more budget friendly cost.

#### **Reinforced Bindings**

- **Library Bindings:** These books are of higher quality publisher binding, usually fanned and glued, and may also be sewn. Books may be identified as Library Bindings on ipage.

- **Paperback Laminate:** Ingram offers a 5-mil clear polyester, applied to front and back cover. The 2-mil spine ensures the book remains flexible. The covers are crystal clear and will not yellow with age. The laminate is acid free and made from environmentally friendly materials using solvent free adhesives.

#### **Pre-Binding Services**

Our inventory includes over 19,500 prebound titles from Perfection Learning and San Val (Turtleback Books). These editions are searchable by publisher or binding through ipage Power Search and are also identified on ipage as Prebound-Sewn or Prebound-Glued.

Turtleback Books have a double-fan adhesive binding and durable spine, and the quality and workmanship of the binding is guaranteed for the life of the book. We scan original artwork, digitally print on durable paper stock to fit the new binding, and laminate books in a polyester film that easily wipes clean.

#### **11. Once the vendor receives the item from the publisher, how much time is generally required to catalog, process, and ship the item before it is received by MVL?**

We ship in-stock, non-processed, and non-cataloged book orders within 24 hours or on the same business day if placed before local cut-off time at your designated Ingram distribution center. In-stock processed books not requiring custom cataloging services ship within two to five days of receipt of order. No other vendor can attain this level of service. Our turnaround time for in-stock, shelf-ready, custom cataloging orders is 7–10 working days from receipt of order to shipment.

Continuations and New Title Notification/Standing Order Programs require a backorder period, as we order titles on a pre-publication basis to allow Program customers to be the first to get these titles. Items that do not require cataloging services will ship within 24–48 hours after the title is received into the designated Ingram distribution center.

For titles Ingram inventories but that are temporarily not in stock, Ingram attempts to place an order with the publishers within three (3) business days of receipt of order. Our ability to obtain out of stock titles depends on the item's continued availability from the publisher with whom Ingram buyers have an established relationship.

Should the Library order titles Ingram doesn't carry, we attempt to order the book, if available, through normal U.S. wholesale channels. Turnaround time depends on publisher availability; however, because of our long-standing relationships with publishers, we estimate one to three weeks on available items and sixty to ninety days on special order items currently unavailable from the publisher.

Ingram can provide titles that are in print and available from the publisher. Some publishers choose to sell only directly to end users such as schools or libraries. These direct-only publishers are defined as those publishers whose titles are not available on the open market to distributors.

#### **12. Please indicate whether you are presently able to interface with SirsiDynix's Symphony ILS system for the purposes of online electronic selection lists, ordering, cataloging, and invoicing. Be specific as to how this is to be accomplished and whether there are any additional hardware, software, telecommunications, or service costs to MVL involved. If there is no interface with SirsiDynix's Symphony ILS system for any of these functions, please indicate if and when you expect this service to be available.**

Ingram is experienced in working with all major Integrated Library Systems, including SirsiDynix's Symphony. The Mission Viejo Library is currently set up to receive Enriched EDI services from Ingram, including selecting, ordering, cataloging, and invoicing. There is no additional hardware, software, telecommunications, or services needed to continue interfacing with the MVL's ILS system.

#### **ipage Selection Lists**

ipage Selection Lists, like the shopping cart functionality found on other Internet sites, are among the most



versatile features on ipage and the starting points for ipage ordering. Once you create a list, you can add products, delete products, move products to other selection lists, or send it as an online order.

By ordering online using our selection list functionality, you can create multiple title lists. You can then download these lists into a variety of formats such as BISAC, FlashBack®, or brief MARC order records for import into your ordering or library automation system, provided that one or more of these formats is compatible.

Users can create a selection list by uploading a file of EAN's and, optionally, quantities, including using an upload source document (.xls, .xlsx, .csv) where EAN's are stored as text.

You can easily access your selection lists in ipage in two ways: via the Lists drop down menu, or via the Selection Lists link under the Order drop down menu. The Active Selection List(s) page is the starting point for creating and managing your selection lists or orders. You can:

- create a new list
- merge up to ten different lists into one new list
- recover deleted lists (within a specified timeframe)
- view or edit lists
- check stock availability
- utilize the *Price this List* feature
- E-mail lists
- download lists
- check for duplicates
- delete or archive selected list

Clicking the View button displays all titles on a selection list. To change the sort order, click the arrow in the Sorted By box and select your desired sort option. Users can sort by title, author, ISBN or product code, binding, publisher, pub date, or US SRP (U.S. suggested retail price).

ipage allows you to create the following types of selection lists:

- **Private List:** only the list creator and the user's ipage Administrator can view or edit.
- **Public List:** only users in the same ipage account as the list creator can view or edit.
- **Shared List:** only users within the same Ship-to account as the user who created the list can view or edit.
- **List Lock:** A list creator can lock the list to prevent others in the account from making changes.

## 9XX

This custom MARC feature allows the user to create a list in ipage and then add local data (such as fund, location, collection code, requestor, etc.) in 9xx tags and subfields, per specifications of their ILS, for each title to be exported in a brief MARC record.

The list is then exported in brief MARC format, and the ILS system loader is used to load the records to the ILS. Upon loading to the ILS, an order record and a brief cataloging record are created. These records can be overlaid with the full MARC records in your ILS system. Any ILS System that can load MARC records should be able to load order records as well. If they have questions, they will need to contact their ILS System Vendor to confirm.

### 13. Are users able to edit/add/delete grid codes and templates from the online interface?

Yes. Once the library's ipage administrator adds custom MARC data to an account, users can create a grid template, selecting which Custom MARC mapped data elements to use and which user can apply them to an entire selection list or at a line-item level within a list.

When an ipage user applies a template to a selection list, quantities ordered will adjust by default according to the applied template and according to individual allocations made across library fund codes or locations. The selection list is then downloaded in Custom MARC format, and subsequently uploaded into the library's acquisition system for order placement via EDI. Unlike other library book vendors, Ingram offers grid creation capabilities free of charge.



**Grid Summary:** We have a Grid Summary option available for our Library customers who use grids. Users can select two of their Custom MARC (9XX) tags as fields used to summarize a “gridded” selection list. After the ipage administrator chooses the 9XX tags to be included in their grid summaries, the Grid Summary button appears for selection lists with a grid attached. When a user clicks the button from the List of Lists page, the View Selection List page, or the Edit Selection list page, ipage takes the user to a page containing quantity, extended list price, and customer discount price totals by the Grid Data elements associated with that selection list.

**Find and Replace for Grid Data:** At a selection list level, you can now perform a “find and replace” function to update grid data attached to the list or to items in the list. This feature is available from the Search Result View of a selection list.

Using this feature allows you to quickly update any occurrence of one grid data element with a different option. This is especially helpful, for example, as libraries roll to a new fiscal year and need to update a fund value.

**Exporting Grid Information in Excel:** You can set your Excel downloads to pull in grid information. Under Template Preferences on the User Settings page, you see the option as a yes/no toggle. The option’s default setting is No, but if you wish to include grid information in your downloads, set this option to Yes.

**Applying Grids to New Title Notification/Standing Order Programs:** Libraries can apply multiple grids within a single New Title Notification/Standing Order Program enrollment, greatly reducing time spent on setting up and managing New Title Notification/Standing Order Programs.

**14. Please identify vendor’s database source(s) for MARC bibliographic cataloging and authority control records. What is/are the size of the database(s)?**

Ingram provides access to full-level MARC records through BookMARC, the proprietary Ingram cataloging database. BookMARC includes records from the Library of Congress and OCLC, as well as tens of thousands of entries created by Ingram’s MLS-degreed catalogers. Sizes of databases:

- BookMARC = 18 million MARC records
- Library of Congress = more than 20 million records
- OCLC WorldCat = more than 540 million records

Ingram cataloging is in accordance with the latest editions and versions of the Anglo-American Cataloging Rules/RDA, MARC21 Format, OCLC Bibliographic Formats and Standards, Library of Congress Classification Schedules, Dewey Decimal Classification, and Library of Congress Subject Headings. Ingram cataloging is consistent with LC rule interpretations and cataloging practices.

If standard BookMARC cataloging does not meet the Library’s needs, Ingram offers a full array of custom cataloging options. Services include:

- Searching for added copy in the Library’s ILS utilizing Z39.50 protocol (minimum spend may apply)
- CIP, OCLC, or other Level 5/7 records can be brought up to FULL AACR2 / RDA / MARC 21 standards by an MLS-degreed cataloger.
- Where existing or derived records are unavailable, an original cataloging record can be created by an MLS-degreed cataloger.
- If the Library requires OCLC Holdings Updates, Ingram can provide this service with an OCLC Data Sync Collection.

**15. Please describe vendor’s process and time frame for the following services:**

**a) preparation of profiles**

Upon notification of award, Ingram's Bids and Contracts Department immediately issues internal documentation detailing contractual specifications. This provides for automated criteria that will apply to new accounts when established, including discounts, payment terms and freight terms.

Our Senior Manager, Technical Services, shares information gathered at the Account Review Meeting with our Client Integration/Account Services, Cataloging, EDI leadership, and other Ingram Library Services departments. Our Client Integration team sets up new accounts according to contract specifications. Customer Service standards will be reviewed to ensure that they meet the requirements of the new contract.

The Technical Services team sets up profiles for each account to match your requirements. As part of the initial Account Review, the Client Integration Specialist helps you clearly define your requirements and complete your cataloging and processing profile. They generate samples and create the tables and profiles used to drive your cataloging and processing. We will send samples, tables, and profiles for your review to ensure accuracy of setup. This process continues until you are completely satisfied with the finished product.

EDI Support Specialists assist with the setup of your EDI connection with Ingram so that you can submit orders, receive purchase order acknowledgements/invoices, and use ASN via electronic data interchange, where applicable. These specialists also ensure your enriched data elements (grids) are added into iPage and complete the initial Custom MARC mapping for any on-order record needs.

After we establish your accounts, your Client Integration Specialist applies your contract specific terms and discounts to your accounts within our internal billing and order management system. The Bids and Contracts team runs a detailed report to verify that all accounts match the terms of the contract, including discounts, freight, processing and cataloging prices, and payment terms.

**b) provision of selection lists (print and electronic options)**

Ingram's Collection Development team comprises 10 MLS-degreed librarians and managers, 4 long-term publishing industry expert administrators, and 1 data manager partway through her library degree.

Our 10 librarians each have at least five years of public library experience, and the Collection Development team has almost 300 years of library and/or publishing experience combined. Members of the team have participated in local, state, and national library conferences and have presented on collection development, forthcoming books, the elements of a good picture book, selection tools, library marketing, Dewey versus BISAC organizational schema, library technology, handling difficult patrons, library staff development, and more.

The Collection Development team is well-known for top quality selection lists for Opening Day Collections (ODCs) and ad hoc lists, and libraries purchase Ingram's custom Collection Development services for projects when lists from other vendors do not work.

Ingram's MLS-degreed librarians and Program administrators work with you to find materials and develop your collections. Using their public library selector experience, and tracking trends that impact reading behavior, they identify titles you need for a well-balanced, diverse, relevant, high-circulating collection.

Ingram offers a wide range of cutting-edge and comprehensive Collection Development services, branded as iCurate. Grouped into five overarching services, they reflect the work of MLS-degreed librarians rather than canned lists and automated queries—No Robots Here!

Our Collection Development Librarians have built and daily maintain a proprietary database with value-added data, such as diverse title distinctions, assigned genre, and state interest, along with the more standard metadata.

We meet with large and small publishers throughout the year to learn about forthcoming titles, publicity, and other important publisher news. And, because Ingram is the main provider of books to bookstores, large retail

stores, and online booksellers, we can generate reporting that identifies “hot” titles before they become popular in libraries. Our services include:

- iCurate *Complimentary*: Curated Lists & Standing Order Programs
- iCurate *Coming Soon*: Forthcoming Monthly Title Subscription
- iCurate *Core*: One-Time Gap Analysis (page 39)
- iCurate *inClusive*: Diversity Audits Made Easy (page 28)
- iCurate *Custom*: Ad Hoc Lists, Opening Day Collections, & Ongoing Curation (page 28)

### iCurate **Complimentary**: Curated Lists

iCurate *Complimentary* includes thousands of hand-selected lists available without charge to customers on ipage in the Curated Lists tab. These lists are broken down into Adult, Children’s, Teen, Audiovisual, Award & Noteworthy, and K12 and are updated regularly: weekly, monthly, quarterly, or annually, depending on type of list.

Ingram recognizes the need for more diverse books. To that end, we create regularly updated lists of diverse titles, such as *Asian Interest*, *Black Interest*, *Diverse Families*, *Income Inequality*, *Indigenous Interest*, *Latinx Interest*, *LGBTQIA+ Interest*, *Mental Health*, *Middle Eastern Interest*, *#ownvoices*, *Serious Illness*, *Social Emotional Learning*, *Spanish Language Books*, and *Special Needs*. Our Collection Development librarians mark diverse title distinctions in our databases as we work titles that feed in from publishers every day. Applying these distinctions allows us to identify as many quality, diverse titles as possible, both when creating these diverse category lists and when creating all other lists and projects.

For customers who like to find titles serendipitously in ipage, we created an “Expertly Curated” icon that appears under a title in your Search Results or Selection Lists. It indicates that a title is in one or more of our Curated Lists. Within the title detail page, you can view the lists the title appears on and click straight into any of the featured lists. So, if you were interested in the book *Little You* because you were looking for Indigenous Peoples Board Books, you could click straight into the *Indigenous Peoples Board Books* Curated List and instantly find other quality titles. *Pricing*: Complimentary

<b>Adult</b> <ul style="list-style-type: none"><li>• <a href="#">Adult/YA Crossovers</a></li><li>• <a href="#">Asian Interest</a></li><li>• <a href="#">Black Interest</a></li><li>• <a href="#">Debut</a></li><li>• <a href="#">Genre Fiction</a></li><li>• <a href="#">Graphic Novels</a></li><li>• <a href="#">Greatest HITS (High Interest Title Selections)</a></li><li>• <a href="#">High/Low</a></li><li>• <a href="#">HITS (High Interest Title Selections)</a></li><li>• <a href="#">Indigenous Peoples Interest</a></li><li>• <a href="#">Large Print</a></li><li>• <a href="#">Latinx Interest</a></li><li>• <a href="#">LGBTQIA+ Interest</a></li><li>• <a href="#">Middle Eastern Interest</a></li><li>• <a href="#">Social Awareness</a></li><li>• <a href="#">Spanish Language Books</a></li><li>• <a href="#">Subject Lists</a></li><li>• <a href="#">Top Library Titles</a></li><li>• <a href="#">Virtual Book Display</a></li></ul>	<b>Children's</b> <ul style="list-style-type: none"><li>• <a href="#">Asian Interest</a></li><li>• <a href="#">Black Interest</a></li><li>• <a href="#">Board Books and Big Books</a></li><li>• <a href="#">Children's/Teen Crossovers</a></li><li>• <a href="#">Debut</a></li><li>• <a href="#">Genre Fiction</a></li><li>• <a href="#">High/Low</a></li><li>• <a href="#">HITS (High Interest Title Selections)</a></li><li>• <a href="#">Indigenous Peoples Interest</a></li><li>• <a href="#">Latinx Interest</a></li><li>• <a href="#">LGBTQIA+ Interest</a></li><li>• <a href="#">Middle Eastern Interest</a></li><li>• <a href="#">Social Awareness</a></li><li>• <a href="#">Spanish Language Books</a></li><li>• <a href="#">Top Library Titles</a></li><li>• <a href="#">Virtual Book Display</a></li></ul>	<b>Teen</b> <ul style="list-style-type: none"><li>• <a href="#">Adult/YA Crossovers</a></li><li>• <a href="#">Asian Interest</a></li><li>• <a href="#">Black Interest</a></li><li>• <a href="#">Children's/Teen Crossovers</a></li><li>• <a href="#">Debut</a></li><li>• <a href="#">Genre Fiction</a></li><li>• <a href="#">Graphic Novels</a></li><li>• <a href="#">High/Low</a></li><li>• <a href="#">HITS (High Interest Title Selections)</a></li><li>• <a href="#">Indigenous Peoples Interest</a></li><li>• <a href="#">Latinx Interest</a></li><li>• <a href="#">LGBTQIA+ Interest</a></li><li>• <a href="#">Middle Eastern Interest</a></li><li>• <a href="#">Social Awareness</a></li><li>• <a href="#">Spanish Language Books</a></li><li>• <a href="#">Top Library Titles</a></li><li>• <a href="#">Virtual Book Display</a></li></ul>
<b>Audiovisual</b> <ul style="list-style-type: none"><li>• <a href="#">Audiobook: Adult Forthcoming Audio</a></li><li>• <a href="#">Audiobook: Youth Forthcoming Audio</a></li><li>• <a href="#">Video</a></li><li>• <a href="#">Video Game</a></li></ul>	<b>Award &amp; Noteworthy</b> <ul style="list-style-type: none"><li>• <a href="#">2020 Eisner (Graphic Novels)</a></li><li>• <a href="#">2020 Harvey Award (Graphic Novels)</a></li><li>• <a href="#">ALA Awards 2021</a></li><li>• <a href="#">Best Books and Notables from ALA 2021</a></li><li>• <a href="#">Excellence in Graphic Literature Awards 2020</a></li><li>• <a href="#">Libraries Transforming Communities Grant</a></li><li>• <a href="#">NEA Big Read</a></li><li>• <a href="#">Starred Reviews</a></li></ul>	<b>K12</b> <ul style="list-style-type: none"><li>• <a href="#">Homework Help</a></li><li>• <a href="#">Picture Book Themes &amp; Concepts</a></li><li>• <a href="#">Recently Released</a></li><li>• <a href="#">Reference</a></li><li>• <a href="#">STEAM &amp; Makerspace</a></li></ul>



Our lists receive tens of thousands of views and downloads each month and include *High Interest Title Selections (HITS)* of the most anticipated forthcoming titles in each area, *Top Titles Lists* to help fill in gaps after weeding or during regular maintenance, and much more.

Our *Virtual Book Display* sections feature trending and timely topics, such as *Baking for Any Mood*, *Girls' School Fiction*, and *Holiday Celebrations*, while our *Subject Lists* feature regularly updated topics always of interest, such as *English Language Learning*, *Nonfiction Classics & Essentials*, *Homeschooling*, *In the News*, *Movie/TV Adaptions*, and many more.

*"I am LOVING these [ipage®] lists! Not only are they helpful with regular collection development work, they're making it easy to put together mini collections for display. LOVE THEM!"*

— Katie J., Adult Collection Development Coordinator

Ingram recognizes the need for more diverse books and creates regularly updated lists of diverse titles, such as *Asian Interest*, *Black Interest*, *Diverse Families*, *Income Inequality*, *Indigenous Interest*, *Latinx Interest*, *LGBTQIA+ Interest*, *Mental Health*, *Middle Eastern Interest*, *#ownvoices*, *Serious Illness*, *Social Emotional Learning*, *Spanish Language Books*, and *Special Needs*.

Our Collection Development librarians mark diverse title distinctions in our databases, as we work titles that feed in from publishers every day. We can therefore identify as many quality, diverse titles as possible, both when creating these diverse category lists and when creating lists for all other projects.

For customers who like to find titles serendipitously in ipage, we have created an "Expertly Curated" icon that appears under a title in your Search Results or Selection Lists. It indicates that a title is in one or more of our Curated Lists.

Within the title detail page, you can view lists on which the title appears and click straight into any of the featured lists. So, if you were interested in the book *Little You* because you were looking for Indigenous Peoples Board Books, you could click directly into the *Indigenous Peoples Board Books* Curated List to instantly find 18 other quality titles.

#### **iCurate *Coming Soon*: Forthcoming Monthly Title Subscription**

Easily manage new and forthcoming titles with Ingram's suite of librarian-curated lists delivered on the first of every month within ipage. Featuring far more than simply bestsellers, this annual subscription offers three size options by category so you can efficiently maintain a relevant collection by allowing our librarians to do the heavy lifting.

Our collection development librarians stay updated on publishing and cultural trends. They also use their public library experience to tailor each list to include what they would want in their own public library collection to increase circulation. *Coming Soon* lists are balanced according to the typical American public library—more Picture Books than Board Books, more YA Fiction than YA Nonfiction, and more Adult Nonfiction 600s than 400s. The lists also reflect publishing-industry schedules and seasonal subjects throughout the year – which can mean more titles in October, for example, than in February.

You can subscribe to Adult, Children's, and/or Teen lists and mix-and-match small, medium, and large lists within each age category. There is no price difference between sizes, and you can change the size at any time. Get lists in the following subjects:

- **Adult Lists (15 lists)**  
Adult Fiction; Adult Graphic Novels; Adult Large Print Fiction & Nonfiction (2 lists); Adult Nonfiction 000s – 900s & Biographies (11 lists)

- **Children's Lists (8 lists)**  
Board Books; Picture Books; Easy Nonfiction; Easy Reader Fiction & Nonfiction (2 lists); Juvenile Fiction; Juvenile Graphic Novels; Juvenile Nonfiction
- **Teen Lists (3 lists)**  
Teen Fiction; Teen Graphic Novels; Teen Nonfiction

Ingram's iCurate *Coming Soon* features an **Enhanced Duplication Management** tool in ipage, available exclusively for *Coming Soon* subscribers. This tool allows libraries to manage duplicates quickly and easily on customer-created and Ingram-delivered Selection Lists, iCurate *Complimentary* Curated Lists, and in Search Results. It also allows users to filter Selection Lists and Search Results to include or exclude titles already in another Selection List(s), Ordered from Ingram, and/or in their Holdings (if submitting holdings to Ingram via Z39.50). Pricing for Mission Viejo Library: Complimentary.

#### **iCurate *Complimentary*: Standing Order Programs/New Title Notifications**

Ingram can help ease the burden of keeping up with popular authors, titles, and series titles for all ages. With our no-commitment Standing Order Programs, you are assured of having high-demand materials on order, in your catalog, and on your shelves *before* patrons come looking for them. All of Ingram's standing order programs are complimentary for our customers—there are no hidden costs. In addition, Ingram does not alter the return policy on titles ordered through our Standing Order or Continuation Programs—it is the same return policy no matter how you order or learn about the title.

The Ingram Collection Development department curates, maintains, and manages 16 Standing Order Programs that help libraries easily track and order forthcoming titles from bestselling authors for all ages; Easy Reader series, Fiction, Nonfiction, and Graphic Novel series for all ages; Nonfiction and Travel Continuations; ReviewALERT<sup>SM</sup> Programs for Adult and Youth; mass market genre Fiction; a popular video Program; an awards & state lists Program; and Ingram's proprietary build-your-own Standing Order Program, iSelect®.

Ingram's Standing Order Programs have been ranked as the best in public library surveys and offer several advantages unmatched in the library market:

- ✓ **Convenient:** Enrollees can manage their profiles online through ipage 24/7, and any changes to the enrollment profile take effect immediately with no waiting.
- ✓ **Current:** Ingram librarians and administrators hand-select and maintain offerings to ensure programs include only active offerings. We know libraries do not want to encumber their budgets with titles that will never publish because those titles are completed or discontinued offerings, so we meet and work with publishers continually to stay on top of publishing news.
- ✓ **Commitment-Free:** With Ingram, you do not receive titles unexpectedly in your library. Customers can enroll in either Auto-ship, which delivers a list to ipage and allows two weeks for editing before the order places automatically, or in Report Only, to receive lists, which they can edit and order on their own time schedule.  
We order most titles 2–3 months prepublication (sometimes up to 6 months for the most popular authors), and you may cancel backorders at any time before they arrive in our warehouses.
- ✓ **Complimentary:** Ingram never reduces the discount or elevates pricing on titles running on a Standing Order Program. Our 16 Standing Order Programs truly are complimentary. There are no hidden costs.
- ✓ **Customizable:** Customers can mix-and-match Program profiles an infinite number of ways to ease their workflow and ordering process. They can rename any profile for easy identification and to prevent over or under-ordering. For example, someone could enroll in the Author (Adult) Program, rename it *Adult Fiction Hardcover*, and select only the hardcover bindings of titles from authors they've chosen. They



could then create a separate profile, rename it *Adult Large Print*, and select only large print formats of titles from their authors they've chosen on their profile.

Our Programs allow line-item grids, so if a library typically wants specific branch allocations and funding codes for the works of a specific author, and different branch allocations for the titles of another author, they simply select the correct grid for each offering in the enrollment form. When lists are delivered, the correct grids are already applied.

Although we encourage libraries to review their Program lists, many Author (Adult) and Nonfiction and Travel Continuations customers with line-item grids established simply allow lists to order automatically.

- ✓ **Customer Service:** Two long-tenured Customer Service Administrators provide special customer service for Standing Order Program customers. Although our Programs are organized and automated to allow most libraries to self-serve, our Administrators help libraries daily with everything from routine enrollment edits and cancelling or changing quantities on backorders, to onboarding new Standing Order Program customers or answering questions about why a specific title did or did not run on a Program.
- ✓ **Comprehensive:** Ingram provides 16 Standing Order Programs for Children, Teens, and Adults in multiple formats to cover the entire library:

#### **Programs—Adult**

**Author Fiction (Adult)**—Provides the latest hardcover (and large print & audiobook) releases from customer-selected bestselling adult Fiction authors—our most popular Program. Program runs twice a month and includes titles up to 6 months prepublication.

**Mass Market Genre Fiction (Adult)**—Gives customers the top five new titles each month in the Fiction genres they select, including: *African American*; *General Fiction A, B, & C*; *Mystery A, B, & C*; *Romance A, B, C, D, & E*; *Speculative Fiction*; and *Westerns*. Program runs once a month and includes titles up to two months prepublication.

**Nonfiction Continuations (Adult)**—Provides timely notification of regularly updated Nonfiction titles in a variety of subject areas from atlases to writing handbooks. If you don't want to receive a title every time a new edition releases, you can select a desired cycle. Program runs twice a month and includes titles up to four months prepublication.

**Nonfiction Series (Adult)**—Provides the latest series Nonfiction geared toward adults, including "For Dummies" and hundreds of others. Program runs twice a month and includes titles up to three months prepublication.

**Popular Series (Adult)**—Sends customers list of the newest and hottest titles from the popular adult Fiction series the customer selects. Program runs once a month and includes titles up to three months prepublication.

**ReviewALERT<sup>SM</sup> (Adult)**—Notifies customers of book reviews in their selected journals (*Booklist*, *Kirkus*, *Library Journal*, *Publishers Weekly*); can be limited by Dewey® Century, Fiction, and Graphic Novels to save time, as well as starred reviews, unstarred reviews, and all reviews. Program runs twice a month.

**Travel Continuations (Adult)**—Offers a flexible method of receiving regularly updated travel guide titles. If you don't want to receive a title every time a new edition releases, you can select a cycle. Program runs twice a month and includes titles up to four months prepublication.

#### **Programs—Youth**

**Author/Illustrator (Children's)**—Offers the newest titles by bestselling children's authors and illustrators (ages 0-12). Program runs twice a month and includes titles up to six months prepublication.

**Author (Teen)**—Offers the newest titles by bestselling YA authors (ages 12-17). Program runs twice a month and includes titles up to six months prepublication.

**Easy Reader (Youth)**—Sends notification of the newest titles from customer-selected leveled beginning reader series. Program runs twice a month and includes titles up to three months prepublication.

**Nonfiction Series (Youth)**—Provides the latest series Nonfiction geared toward youth, including DK Eyewitness Books and hundreds of others. Program runs twice a month and includes titles up to three months prepublication.

**Popular Series (Youth)**—Sends customers lists of the newest titles from popular youth Fiction series. Program runs twice a month and includes titles up to three months prepublication.

**ReviewALERT<sup>SM</sup> (Youth)**—Notifies customers when titles receive a review in their selected journals (*Booklist*, *Bulletin of the Center for Children's Books*, *Horn Book Magazine*, *Kirkus*, *Publisher's Weekly*, *School Library Journal*); can be limited by industry standard age ranges and Graphic Novels and starred reviews, unstarred reviews, and all reviews to save time. Program runs twice a month.

#### Programs—For All Ages

**Awards\* Book Clubs\* State Lists**—Offers new award winners and honor books, major book club picks, and state lists. Program runs the day after books are awarded/announced.

**Graphic Novel (Adult & Youth)**—Features expertly hand-selected and age-ranged Graphic Novel series. Program runs twice a month and includes titles up to three months prepublication.

**iSelect<sup>®</sup>**—Ingram's own build-your-own Standing Order Program includes BISAC subject categories and sub-categories selected by the customer and is based on Ingram buy level; can also be filtered to view or exclude titles from specific publishers. Program runs every Sunday.

**Popular Video (Adult & Youth)**—Provides weekly notification of the latest blockbusters, independent films, foreign films, classics debuting on DVD, TV series (Youth), TV series (Adult), TV movies/mini-series (Youth), TV movies/mini-series (Adult), documentaries, anime, and family film on DVD, Blu-ray, DVD/Blu-ray combo, and Blu-ray 3D. Program runs every Thursday.

#### **c) electronic ordering and confirmation**

Ingram can accept electronic orders through EDI (Electronic Data Interchange), through ipage, or via email.

For orders placed via EDI, Ingram returns an acknowledgement to their outgoing folder on our FTP server, if the customer's ILS system supports the FTP acknowledgement transaction. If an acknowledgement is not supported by their ILS System, Ingram returns an email confirmation via email to user-specified email address.

The emailed order acknowledgement includes ISBN/EAN; Title; Author; Publisher; List Price Line Item; Order Units; Ship Units; B/O or Cancelled Binding; Status Code; and Shipping DC. Order acknowledgements are received within 2–4 hours.

Customers who do receive an EDI acknowledgement that is returned to our FTP server can also be setup to receive email confirmations in addition to what we post on the FTP server.

#### **Ordering through ipage**

When ready to place an order, users can simply click the Standard Order button for that list. ipage then prompts users to complete additional order details, such as shipping instructions, warehouse selection, backorder instructions, P.O. Number, etc.

#### **Folders**

ipage allows users to sort selection lists into pre-built folders. By default, your selection lists will go into folders labelled as follows:

- **Active:** active selection lists, regardless of Public/Shared/Private status

- **Archived:** any lists you choose to archive or that ipage archives automatically due to lack of activity, regardless of Public/Shared/Private status.
- **Ingram Lists:** the default destination for any selection lists you receive tied to a New Title Notification/Standing Order Programs enrollment (either Report Only or Auto Ship).

In addition to these default folders, users can create up to 25 custom folders. As you create a new selection list in ipage, you can specify a folder, rather than the default Active folder, into which you would like to place the list. Other account users cannot see or affect those custom folders and cannot place a selection list into another user's folders. Other account users can, however, view and "folder" a Public selection list.

#### **Order Confirmation from ipage**

ipage sends immediate order confirmation, which you can print. The ipage order confirmation includes quantity ordered, title, author, EAN, whether the item shipping status, discount, and retail price.

#### **Backorders**

After receiving an order, Ingram ships all titles currently in stock. We then place on backorder any remaining titles normally available through Ingram. Any title Ingram stocks will be available for order or backorder from your designated primary and secondary distribution centers.

One of the parameters set at the account level is Backorder Cancellation Date. This is the number of days to wait for a backorder to be filled before being cancelled. For titles not yet published, the Library has a choice to have these items either cancel at the end of the account's established backorder period, or for the backorder period to begin only after Ingram first receives the title after publication. The first option may result in a lower fill rate.

We recommend the Library set this cancellation date to be the same on their automation system so that backorders cancel at the same time automatically. It is up to the local automation system to delete any bibliographic records associated with order records for materials ultimately cancelled.

- d) cataloging (including descriptive cataloging, classification, and authority control)**
- e) downloading of cataloging records**

Please see our response to *A statement as to the vendor's ability to conform to the cataloging and processing requirements of MVL*, above on page 5, for our complete cataloging procedures.

- f) invoicing (electronic and print options)**

Invoices list information for each title in the following order:

- |                                 |                    |
|---------------------------------|--------------------|
| 1. quantity ordered and shipped | 6. Unit list price |
| 2. author                       | 7. Discount        |
| 3. title                        | 8. Unit net price  |
| 4. publisher                    | 9. Extended price  |
| 5. ISBN/EAN                     |                    |

We list invoice items alphabetically by author or title, per your request. All invoices include an invoice number and date, order entry number, and Ingram's Federal ID number. They also include Library name, ship to and billing account addresses and numbers, and purchase order number (can be up to 22 characters in length). Order data includes shipping warehouse and location, carrier, ship date, number of cartons, and total weight of order.

Invoices also include a code for each binding type. Books with library binding, for example, might have notation LIB after the title.

Ingram can invoice for cataloging and processing on the same invoice on which materials appear, or on a separate invoice, per your request. If billed on the same invoice, cataloging and processing charges appear as aggregate costs (not per-title costs) in separate line items per cataloging/processing component.

We have included a sample invoice for a book order with shelf-ready and special charges with this proposal, per Section 3.7.3.

#### **EDI Invoicing**

We provide EDI invoicing for Symphony and support daily or weekly summary invoices. For customers opting to receive electronic invoices, Ingram places electronic invoice files on the Ingram FTP for customer retrieval. E-invoices streamline workflow and greatly increase efficiency, but we can continue to provide paper invoices to electronic invoice customers.

#### **ipage Invoices**

Customers can access their invoices online via ipage our web-based selection, ordering, and account management tool. With ipage, you can view and print invoices on demand as soon as they appear in ipage.

#### **Partial Invoices**

ipage indicates partial invoices with an asterisk after the Ingram Reference Number. Outstanding invoices appear under Open Invoices. You can access an original invoice by searching using the same reference number under Closed Invoices.

#### **Payment Terms**

Payment terms under this contract shall be NET 30 EOM. We require payment for invoices within these terms for purchase orders completed or not completed.

While other vendors demand payment from invoice date, we calculate our terms on statement date at the end of each month. With payment due 30 days from statement date, your payment is due an average of 45 days from invoice (30-59 days).

You must report invoice discrepancies to Ingram within 30 days of the invoice date. All discrepancy reports must include an invoice number and date of invoice. Discrepancies reported after 30 days from invoice date do not receive adjustment.

#### **g) shipping library materials**

We are pleased to offer **Ingram-paid freight from your designated primary and secondary distribution centers**. We hold orders until a minimum quantity of 15 units is met. The qualifying unit quantity is subject to change with notice. Items picked, packed, and shipped together count as an individual shipment.

Ingram chooses the most cost-effective shipping method but uses UPS ground service to transport most of Ingram's goods. Ingram reserves the right to adjust distribution center designations to provide the most favorable service to your Library. We ship F.O.B. Destination. With F.O.B. Destination, Ingram is responsible for product until delivered to its destination; liability lies with the receiving agency thereafter.

When freight charges on an individual account surpass 2.5% of the account's expenditures, Ingram reserves the right to change the shipping settings under this offer. Changes to account settings such as one warehouse for shipments or shipment timetables and order consolidation levels are examples of such alterations. We work closely with the Library to ensure that any changes are in the best interests of both parties.

Due to the impact of rising oil prices, Ingram has instituted a \$3.00 fuel surcharge. These charges appear as Shipping and Handling charges on your invoice and are subject to change with notice.



*Please note:* We are not able to combine orders from across accounts to meet the minimum quantity of 15 units, but we can combine P.O.s for shipping if from the same Shipping account.

### **Delivery and Shipping**

After receiving an order, we ship all titles currently in stock. We then place on backorder (for a length of time you specify) any remaining titles we typically carry. At the end of the backorder period, all unfilled titles automatically cancel, except for titles Not Yet Received from the publisher.

We plainly mark each box in a shipment with the number of boxes included, the library address, and a Control Number (including Order Entry number), which allows you to cross reference the invoice when you receive it. For your convenience, we also mark the carton containing the packing slip.

The shipping label on the carton includes the customer's name, address, and customer purchase order number.

Each carton shipped from Ingram has a 4" x 6" Carton Contents label which identifies titles contained in the box, their ISBNs, and quantities. The label allows library staff to know what each box contains before opening it.

### **No Partial Shipments**

Accounts can be profiled to receive No Partial Shipments. With this account setting, if the entire quantity of a title is not in stock at the time of order, Ingram backorders that title and ships it when we receive the entire quantity from the publisher. Please note that this profile option may lower an order's initial fill rate. We are happy to work with the Library to determine the option that best meets your workflows.

### **Packing Slip**

If you do not require an invoice in the box, Ingram includes with each shipment a packing slip which you can cross-reference to the invoice. We typically enclose the packing slip in the last box of a multi-carton shipment that crosses the shipping manifest, and we mark that box for easy identification.

Ingram's Packing Slip contains the following information:

- Library shipping and billing address
- Date
- Quantity ordered
- Quantity shipped
- Title
- ISBN/EAN
- Binding Code
- Purchase Order Number
- Discount Percentage
- Unit List Price
- Extended Price after Discount

Packing slips can be sorted by title or purchase order number.

### **ipage Request Packing Slip**

Libraries that receive a packing slip with their shipments can also request a copy of a packing slip through ipage®. This service is applicable for shipments from the previous 30 days. The packing slip emails to the address included with the request.

### **Packaging**

To prepare books for shipment, we typically stack them on a cardboard base in a tight cube shape. We then tightly wrap the books in plastic and place them in a high test-weight box. Ingram uses the best quality boxes in the industry with the highest test weights and recycled content permitted to maintain burst strength. We use paper and/or air pillows as dunnage when needed before closing and sealing boxes.

### **16. Does vendor comply with EDIFACT standards?**

Ingram complies with EDIFACT standards following the EDItEUR guidelines. Ingram supports PO—purchase order, ORDERS—order response and INVOIC—EDI invoicing in the EDIFACT format.

### **17. What is the maximum number of selection and cataloging profiles vendor allows? Is there an annual renewal charge applied?**

Ingram offers the ability to create unlimited Standing Order profiles. Processing and/or cataloging is profiled on an account level. Ingram will be pleased to establish the necessary accounts to accommodate all shipping locations and whether processed or unprocessed materials are ordered.

There are no annual renewal charges. Ingram reserves the right to evaluate the number of accounts at any time, to ensure operations is streamlined and is serving the Library as efficiently as possible.

### **18. Describe other related services vendor provides which have not been specified in the RFP but that may be of interest to MVL.**

#### **iCurate *inClusive*: Diversity Audits Made Easy – 2022 Modern Library Awards – PLATINUM AWARD WINNER**

Books allow children and adults to read about and see people like themselves (Rudine Bishop). According to *School Library Journal*, almost 95% of librarians agree that having a diverse collection is either important or very important. At the same time, the publishing industry acknowledges a lack of diverse voices, editors, and leaders, and standard metadata rarely helps identify diverse titles. As a result, diversity audits of a collection are typically manual, time-consuming, and tedious.

With iCurate *inClusive*, a library purchases a one-time assessment of the diversity of their holdings. Within two weeks after emailing holdings EANS to Ingram, the library receives eye-catching reporting on the diversity of their collection—which library administrators can present to their library boards or funding agency—along with lists of the missing diverse titles most popular in public libraries.

Purchase options include Adult, Children's, Teen, or a bundle of All Ages, each of which comes with the following:

- More than 60 charts and graphs showing the diversity of your collection compared to the average public library to provide context in each subject area, age range, and overall collection, including the following diversity categories: Asian Interest, Black Interest, Indigenous Interest, Jewish Interest, Latinx Interest, LGBTQIA+, Mental Health, Middle Eastern Interest, Multicultural, Muslim Interest, Neuro and Physical Diversity  
Diversity categories are based on interest and content rather than solely on author identification, which is not always readily available, accurate, or discernable.
- Links to the iCurate Complimentary Diverse Title Lists provided on ipage, for ongoing support.

Pricing: \$1,500 each for Adult, Children's, or Teens, or \$4,200 All Ages.

#### **iCurate *Custom*: Ad Hoc Lists**

Ingram's MLS-degreed Collection Development librarians create one-time targeted custom lists for libraries with grants, end-of-year spend budgets, or unexpected funds. Librarians might need lists of titles not available in ipage Curated Lists, for titles that might be difficult to search in page.

Generally, these custom lists reflect specific topics, such as large Urban Fiction projects, African Diaspora Biographies, Parenting Collections, Job Searching & Interviewing, Immigration Assistance, etc. and involve a known budget amount that will be purchased through Ingram.

To begin complimentary project, libraries can contact their sales representative, who will provide the appropriate form that includes subject(s), budget, the date the library needs the lists, preferred publication date range, binding preference, and other pertinent information.

Ingram's Collection Development librarians have extensive experience creating lists of all kinds, like lists of religious titles for the Qatar National Library, to a large librarian professional development collection for a public library in Florida, to lists of titles for marijuana collection in a public library in Colorado. With Ingram, it's easy. Pricing: Complimentary when purchased solely from Ingram.

#### **iCurate Custom: Ongoing Custom Lists**

Ingram's Collection Development librarians create ongoing monthly custom lists for several libraries, including Free Library of Philadelphia, Chicago Public Library, and more. These lists are delivered in iPage and are built solely for each library based on customer specifications.

Often, we can save libraries money by pointing out existing lists or programs that will meet their needs. For libraries with truly custom needs, we will create a proposal, often with a few options and price levels, and we will work with you to make the best decision for your library.

Pricing: Based on requirements and estimate of time spent; Ingram will develop an agreement with the specs and pricing detailed and partner with the customer to find the best solution.

#### **iCurate Connection: Collection Development Services Newsletter**

The Ingram Collection Development team continually updates our Standing Order Programs to ensure that offerings remain active and will produce titles. To keep customers updated on those changes, the team publishes a monthly newsletter, iCurate Connection, listing changes and news of each program.

Important Standing Order Program information such as new offerings, offerings ceased by the publisher, titles that won't run on a Program and the reason they won't run, important author or publisher news related to specific offerings, and frequency changes in publication schedules is shared monthly via this electronic newsletter delivered to your inbox.

In addition, the newsletter contains articles written by our Collection Development librarians covering a variety of topics related to collection development and publishing. Past topics have included "Social-Emotional Learning in Picture Books," "Power of Storytelling," "Surviving the Holidays," "Top Adult Debut Titles," and "On Your Mark, Get Set, Bake."

#### **Street Smart**

Ingram understands the importance of getting high-visibility titles into the hands of Library patrons at the same time those titles appear in local bookstores.

Titles designated as part of our **Street-Smart** program include any upcoming new releases with publisher-assigned release dates. Within publishers' parameters, Ingram makes every effort to quickly turn around hot new release titles to arrive in libraries before street date.

We cannot control publishers' street dates. We do, however, work closely with publishers for news of publishing date changes or unexpected releases. We provide updated information via iPage as soon as publishers make such information available, which enables library staff to check the status of any title as its scheduled street date approaches.

We strive to deliver titles before their street dates to libraries with a Street-Smart affidavit on file. However, because our ability to deliver titles in time for release date is contingent on the publisher providing those titles to us, we cannot guarantee arrival on or before release date.

Occasionally, factors such as supply, or transportation issues can compromise our ability to deliver by release date. In such instances, the level of custom processing or cataloging profiled on a Library account may, in addition, cause the title to be delivered after street date.

To receive Street Smart designated titles on or before the release date, the Library should complete a signed affidavit agreeing not to display, circulate, or sell for advanced reading a title before its publisher-assigned release date. Without this agreement, Ingram cannot ship Street Smart titles until one day prior to the publisher's release date, in accordance with our own agreements with publishers.

Occasionally, publishers assign stricter release date parameters to certain forthcoming titles. These titles are part of our Street Smart Select program and, typically, are major releases with large print runs and significant publicity campaigns. Like for Street Smart titles, we ask the library to sign an affidavit to receive Street Smart Select titles in advance of their release dates.

Ingram provides advance notification of Street Smart Select titles, including any order deadlines or minimum order quantities required to participate in the early delivery program. Per the publisher specific guidelines, without a signed affidavit, distributors may not be permitted to deliver Street Smart Select titles until one day before the on-sale date.

#### **InDemand — Lease Alternative Plan**

Though Ingram Library Services believes book ownership to be a more cost-efficient collection development strategy in the long term for libraries, we understand the convenience of book lease programs. Librarians are busy people. Collection Development and regular, attentive weeding are time-consuming responsibilities.

Enter *InDemand*, Ingram Library Services' lease alternative plan. It's a flexible program offering **cataloging and processing, fast turnaround, zero commitment, and transparent pricing**. InDemand is flexible and allows libraries to manage the program according to their needs.

- **Cataloging and Processing**

Books purchased through *InDemand* always include cataloging and processing, which means they arrive shelf ready, on time, at your library.

Standardized C&P includes Mylar and/or laminate cover, Ingram-supplied barcode (using library range and printed with library's name), spine label, and non-programmed RFID tag. We'll also apply an attractive InDemand band to help staff and patrons easily identify these newest titles.

Please note that if you would like a book-only account with no C&P applied, we are happy to set that up for you!

- **Fast Turnaround**

Because of the efficiencies inherent to InDemand's standardized C&P, Ingram can turn around orders within **5 days** rather than 10 days typically required for customized C&P.

- **Zero Commitment**

InDemand customers have approximately one month to review selection lists before ordering and need only place orders at least 3 weeks pre-publication to receive books by street date. Standing orders for InDemand run approximately 2 months prepublication.



- **Transparent Pricing**

The cost for books purchased in the InDemand program includes all cataloging and processing AND shipping. No fuel surcharges apply.

InDemand's pricing model:

MSRP	Cost
\$5.00–\$13.00 .....	\$10.00
\$13.01–\$20.00 .....	\$14.00
\$20.01–\$31.00 .....	\$19.00
\$31.01–\$45.00 .....	\$27.00

Any books with an MSRP of over \$45.00 will be offered at a 20% discount.

What *makes InDemand unique* is that it allows libraries to own every copy of each title they purchase AND provides an easy, reliable method for libraries to sunset extra copies when they no longer need them. By partnering with Thriftbooks and BetterWorldBooks, Ingram can offer the same benefits of books lease programs, like getting hot new titles in quantities libraries need—on time and into the hands of patrons—when demand is highest.

What's more, no retired books end up in landfills. Because Thriftbooks and BetterWorldBooks are certified "green" companies.

#### **Duplicate Checking**

ipage offers multiple duplicate order checking methods, including iMatch, OPAC View, and Selection List Duplicate Checking. With iMatch, you can search your entire collection. As described below, Ingram's duplicate order methods do allow duplicate copies when needed.

#### **iMatch**

Ingram's iMatch collection matching service on ipage matches titles in a selection list with titles already in your library collection, saving you time comparing potential purchases. This powerful tool uses the industry standard Z39.50 protocol to access your library's catalog and retrieve your collection information. It then works with ipage to identify title matches within your selection lists. iMatch identifies duplicates at the branch level, enabling patrons to isolate searches to their local branch's collection in a shared database.

Results are color coded to show matches found. If no color appears to the left of a title, there is no match. A red bar indicates an exact match, yellow a possible match, and green a title-only match. Hovering over a color bar indicator displays matched criteria details, including edition and title.

#### **OPAC View**

This allows library staff to access their Online Public Access Catalog (OPAC) from titles within ipage. Like iMatch, this duplicate service also matches against the Library's holdings, but uses EAN/ISBN as the match point.

The OPAC View feature requires a one-time setup by the Library's Administrator of the ipage account. The administrator should provide the following information:

- OPAC web address
- Their vendor's specific ISBN search index
- A search suffix is also required (some vendors require this)

Once the account administrator implements this feature, users in the ipage account see an OPAC button/graphic attached to titles as they search and build lists. Clicking this button will open a new browser window and point to

this ISBN within the customer's web based OPAC system. The match can occur for as long as the EAN appears in the Library's catalog. Since this feature is ISBN driven, the button does not appear for titles without ISBNs (videos, music, etc.).

### **Selection List Duplicate Check**

The Selection List Duplicate feature in ipage is another way for users to check for duplicates. Users can customize this function so that it checks for duplicates only within the current list, against the user's Private lists, against Shared lists, or against all lists to which an individual user has access. The user can set a default setting for all duplicate checking, or they can choose one of the above options each time they use the feature. Additionally, users can check for duplicates as they add titles to a selection list. This feature checks for duplicates only within the current list.

### **Price This List Feature**

ipage shows current list price. Users can submit selection lists for product pricing with discounts based on the library's discount structure. Every selection list includes a *Price this List* button, which sends the list as a mock order using the ipage user's active ship-to account. The total estimated price of product on the selection list will display. This pricing disappears from the site if the selection list is modified in any way.

Please note that the total cost that *Price This List* provides does not lock in the price. Publishers set list prices that appear in ipage, and they are subject to change without notice at any time. To secure the current list price for up to 60 days, users can use our *Get Quote* service available on every selection list (see below for more information).

### **Price This Title**

Ingram offers an option to include a *Price This Title* button on the title detail page. The Library must request Ingram enable this function on the Library's ipage accounts. Like the *Price This List* function, Price This Title sends the title as a mock order using the active ship-to account of the ipage user. The estimated product price per unit will then display.

### **ipage Training**


Your Ingram Senior Sales Representative is happy to provide on-site ipage training for any staff unfamiliar with ipage or who requests a review of ipage functions. This training, as well as any ongoing training, is **free of charge** and available for as many staff as the library specifies. It can also be remote if that flexibility helps with scheduling groups.

### **ipage Academy Webinar Series**


Ingram Library Services' Inside Sales team hosts our ongoing live webinar training series as part of *ipage Academy*. We hold sessions on many Wednesdays throughout the year, from 1:00–2:00 p.m. CST.

## **19. Describe and provide a sample copy of vendor's management reports issued in relation to services requested in the RFP.**

We provide status reports, including our Packing Slip. The packing slip supplies you with the status of any book shipped, backordered, or out-of-print. The packing slip lists titles alphabetically by title. Titles not included in the initial shipment show a "B" in the "BO" column if they have been backordered. An "S/W" identifies those titles that we will ship from your secondary distribution center.



7311 INNOVATION BOULEVARD  
FORT WAYNE, IN. 46818



20W0293

**1** 2025300-  
SHIP TO NUMBER

3.628  
WEIGHT

1/30/2023  
DATE

C718ML851  
OE #

EH 1  
OT PAGE

ILSCUSTOMERSERVICE@INGRAMCONTENT.COM  
CUSTOMER SERVICE # 800-937-5300

QTY SHIP	QTY ORDER	TITLE \SORTED BY TITLE			P.O. NUMBER	DISC PCT.	BASE RETAIL	EXT. BASE
		TITLE CODE	PROD I.D.	DIV				
1	1	EVICTED	058386567	9781684379798	01262023CMH	43.5	1899	1073
1	1	HEROES OF THE ENVIRONMENT	004714924	9780911867795	01262023CMH	43.5	1699	960
1	1	LEAVE EVERY VOICE & CHANGE A SO	661099748	9780760374597	01262023CMH	43.5	1899	1073
1	1	POWER ON	060437043	9780263543255	01262023CMH	42.5	1995	1147
Totals:		SHIP	PRV	ORD	ORDER	B/O	OUTSTK	MYR
CARTONS:		1					74.92	
		LIST:					74.92	
		RETAIL:					74.92	
		COST:					4253	

THANK YOU FOR YOUR ORDER! PLEASE NOTE THAT YOU CAN VIEW YOUR ORDER STATUS INFORMATION ANY TIME IN TRACK BY GOING TO THE ORDER MENU.

**Key**

**1** Account Number

**2** Order Entry Number

**3** Purchase Order Number


**PACKING LIST**  
NOT AN INVOICE

Discounts will not appear on publisher titles that are a part of your Terms of Sale Agreement. Please refer to your Terms of Sale Agreement for discount information.

Customers receive a Title Status Report monthly. It provides current backorder status information and indicates titles unavailable within your normal backorder period. Listed below are the most frequently used stock abbreviations that appear on the Title Status Report:

- B/O: Out of stock currently and on backorder
- NLS: Title no longer stocked by Ingram
- NYR: Title not yet received at Ingram distribution center
- OSI: Out of stock indefinitely by publisher
- PPD: Title has been postponed by publisher
- OP: Out of print at publisher
- CANC: Cancelled by publisher

Sample Ingram Title Status Report

 <div style="float: right; text-align: right;"> <b>TITLE STATUS REPORT</b>            Anywhere Library            123 Your Street            Happy Town, TN 12345            Date <b>02/01/2019</b> ***            Page <b>1</b> </div>											
<b>01LL70/SHIP70 20v1234 / 20u5678</b>											
This monthly report advises on the status of items that are backordered. Backordered items listed below will remain backordered until the cancellation date, or shown as cancelled. NYR (Not Yet Received) items will remain on backorder for the period of the account's established backordered period beyond the date of first receipt by Ingram.											
QTY ORD	Title	Author	ISBN	Publisher	Customer PO Number	Line Item PO Number	List Price	Prod Type	Where Location	Status	Cancel Date
THE FOLLOWING ITEMS HAVE BEEN CANCELLED:											
1	SHAVE LEARNER	ROBERT JULIE	0163133225	PITMAN	ING181018-LF-1	ING181018-LF-1	17.00	TPAP	TN	NYR	01/21/2019
1	DARTIN DEVOLVES	BEWE MICHAEL J	0062842617	HARPER C	ING181018-LF-1	ING181018-LF-1	25.99	HARD	TN	NYR	01/21/2019
1	LIQUID RULES	MIDGONNIK MARK	0544850194	HOUGHTON	ING181018-LF-1	ING181018-LF-1	26.00	HARD	TN	NYR	01/21/2019
1	RED STAR OVER THE PACIFIC 2ND	YOSHIMURA TOSHI	1682672183	D S BAY	ING181018-LF-1	ING181018-LF-1	36.95	HARD	TN	NYR	01/21/2019
THE FOLLOWING ITEMS WILL REMAIN ON BACKORDER UNTIL CANCELLATION DATE:											
1	LEGEND OF ZILDA BREATH OF THE	PRODYACK	1911015486	THROW DE	ING181204-LH-1	ING181204-LH-1	39.99	HARD	TN	OS	02/12/2019
1	THINK YOUR MIND (BUT IM I	MOLLAND SARAH S	1400208416	THOMAS H	ING181228-BE-1	ING181228-BE-1	24.95	HARD	TN	NYR	
1	PAULA DEWES AIR FRYER CRK	DEER PAULA H	1943014070	PAULA DE	ING190110-LH-1	ING190110-LH-1	24.95	HARD	SN	OS	04/15/2019
1	WELDING COMP 2ND /E REV/E 2/E	REISER MICHAEL	1991866918	NOTES200	ING190110-LH-1	ING190110-LH-1	30.00	HARD	TN	OS	04/15/2019
1	WHAT TO EAT WHEN	BULLER MICHAEL	1436220211	KATE GER	ING190110-LH-1	ING190110-LH-1	28.00	HARD	TN	OS	04/15/2019

Reverse side of Title Status Report:

**PRODUCT TYPE LEGEND:**

TPAP - Trade paper  
 MPAP - Mass market paper  
 HARD - Hardcover  
 AUD - Audio  
 MUS - Music  
 MULT - Multimedia  
 MAPS - Maps, Calendars, Board Games

**STATUS CODE LEGEND:**

BO - Backordered  
 CANC - Cancelled  
 CAN1 - Cancelled: ISBN incorrect/unknown  
 CAN2 - Cancelled: Publisher cancelled  
 CAN3 - Cancelled: Out of stock  
 CAN4 - Cancelled: Out of stock indefinitely  
 CAN5 - Cancelled: Out of print  
 CAN6 - Cancelled: Not yet available  
 CAN7 - Cancelled: Not our publication  
 CAN8 - Cancelled: Delay in publication  
 CAN9 - Cancelled: Apply direct - Not available  
 CAN10 - Cancelled: Publisher did not respond  
 CAN11 - Cancelled: Via OEBO screen  
 IR - In research  
 NAI - Product unavailable through Ingram  
 NOP - Publisher has indicated "not our publication"  
 NYR - Not yet received  
 OS - Out of stock; Backordered  
 OSI - Publisher and Ingram out of stock indefinitely  
 OP - Cancelled; Out of print  
 PPD - Publisher postponed publication  
 PEND - Pending Alibris availability



Sample ipage Order Status Report – Backorders:

INGRAM   ipage									
Backordered Items									
Date Ordered	Backorder Cancel Date	EAN/ Product Code	Product Name	Format	Pub Date	PO Number	Qty	DC	
07/29/2015	02/28/2016	9780307930590 0307930599	SKINK--NO SURRENDER	Paperback	12/01/2015	WENDE COR FAC 7/15/15	2	PA	
07/29/2015	03/31/2016	9780316079433 0316079430	STRANGER	Paperback	01/19/2016	WENDE COR FAC 7/15/15	1	PA	
07/29/2015	06/30/2016	9780764213204 076421320X	ANGELS	Hardcover	06/21/2016	WENDE COR FAC 7/15/15	1	PA	
07/29/2015	01/25/2016	9781627399639 1627399630	BONIC BOOM V01	Paperback	11/24/2015	WENDE COR FAC 7/15/15	1	PA	
07/27/2015	03/31/2016	9781455515935 1455515930	PRIVATE PRIVATE VEGAS	Mass Market Paperbound	01/26/2016	COR/HLI 7/21/2015	4	PA	

Sample ipage Order Status Report – Cancelled Items:

INGRAM   ipage									
Order Status Search Results									
Date Ordered	Status	EAN/ Product Code	Product Name	Format	Pub Date	PO Number	Qty	Unit List Price	Invoice Number
09/15/2015	Cancelled	9781783251483 1783251484	SHARK WARS	Hardcover	03/03/2015	2015-PO-34129	18	\$12.99	PA
09/10/2015	Cancelled	9781501307171 1501307172	JONATHAN FRANZEN	Hardcover	10/22/2015	2015-PO-34074	3	\$24.95	TN
09/01/2015	Cancelled	978083268849 0832688495	CHASING GHOSTS	Paperback	10/01/2015	2015-PO-34006	1	\$24.95	TN
08/27/2015	Cancelled	978060365468 060365468X	OLD FARMERS ALMANAC 2016 BOUND	Rebound- Sewn	09/01/2015	2015-PO-33961	27	\$18.40	TN
08/24/2015	Cancelled	9780804846141 0804846146	COMP MARTIAL ARTS TRAINING MAN	Paperback	08/04/2015	2015-PO-33925	1	\$17.95	PA
08/24/2015	Cancelled	9781471102301 1471102300	EVERYDAY BRITISH	Hardcover	01/01/2013	2015-PO-33925	1	\$16.00	TN
08/24/2015	Cancelled	9781615190850 1615190856	VEDGE	Hardcover	04/03/2013	2015-PO-33925	1	\$24.95	PA
08/12/2015	Cancelled	9781440595957 1440595959	EVERYTHING PARENTS GY COMMON C	Paperback	11/06/2015	2015-PO-33814	37	\$10.99	TN
08/11/2015	Cancelled	9781493429787 1493429780	LONGBOARD SKATEBOARDING	Hardcover	08/01/2015	2015-PO-33800	10	\$25.25	PA
06/19/2015	Cancelled	9781939629722 1939629721	COCONUT KITCHEN	Paperback	08/09/2015	2013-PO-33223	6	\$19.95	PA
06/12/2015	Cancelled	9781477759349 1477759344	CREATING SUPERHERO COMICS	Hardcover	01/01/2015	2015-PO-33214	1	\$27.50	TN
04/23/2015	Cancelled	9780563363466 0563363466	FACING EAST	Hardcover	03/01/2016	2015-PO-32749	1	\$25.50	TN
07/17/2014	Cancelled	9780562156291 0562156291	HT BE HERE	Hardcover	03/08/2016	2014-PO-30137	8	\$25.99	TN

Order Status Information on ipage

Order Status information is available on ipage under the Orders drop down menu:

- **All Open Items:** shows line items currently backordered or being processed and not yet been invoiced.
- **Open Purchase Order Summary:** shows a summary by PO Number that includes the date ordered, total units open, units in process, and units backordered. The PO Number can be clicked on to receive title-specific information.
- **Backordered Items:** includes titles currently on backorder with the date ordered, the backorder cancel date, EAN, title, format, publication date, PO number, quantity, and the distribution center. You can also cancel a backordered item.
- **Recently Shipped Orders:** shows orders shipped within the last 14 days, with the option to view the last 90 days, including the date shipped, order entry number, and shipping tracking number. You can view order details by clicking the order entry number. You can view delivery status by clicking the shipping tracking number.

- **Recently Shipped by P.O.:** like the Recently Shipped Orders, this report shows orders shipped within the last 14 or 90 days. It sorts items by PO Number and includes the date shipped, order entry number, and shipping tracking number. You can view order details by clicking the order entry number. You can view delivery status by clicking the shipping tracking number.
- **Unacceptable Returns:** shows items returned that are outside of Ingram's return policies.
- **ipage Order History:** shows the order date and time, PO number, and the name of the person whose account login placed the order. It also provides a link to an Order Confirmation which gives a detailed summary of the order, including title, author, ISBN, whether the item is shipped or backordered, and retail price.
- **Hard-To-Find Books Order Status:** shows the status of any books ordered through the optional Hard-To-Find Books function on ipage.

Note: The Shipped/Invoiced Items under Order Status Search appears in ipage for 90 days, UNLESS the Purchase Order is still open, e.g., there are titles still on backorder or in processing. Then you may be able to search for older invoiced items.

**20. Provide names of libraries and contacts that are actively using the following online services. Clearly identify those that are SirsiDynix Symphony libraries:**

- a) Electronic selection lists with full text reviews and citations.
- b) Electronic ordering using EDIFACT to interface with the SirsiDynix Symphony Acquisition system, encumber funds, and also to provide on-order records for the public access catalog.
- c) Electronic cataloging, including shelf-ready materials using library's database, and downloading to library's database either FTP, or emailed files.
- d) Electronic invoicing, interfacing with SirsiDynix Symphony Acquisition system.

Ingram is pleased to provide the following three references:

1. **Mohave County Library District** (Arizona)  
Bruce Carter, Technical Services Manager  
[Bruce.Carter@mohavecounty.us](mailto:Bruce.Carter@mohavecounty.us) / (928) 692-5744

Library's ILS system is Symphony. They are currently receiving full text reviews, and processing and cataloging for print materials. The library also utilizes electronic ordering using the X12 format and receives electronic invoicing.

2. **Albuquerque/Bernalillo County Library System** (New Mexico)  
Amanda Searcy, Collection Development Supervisor  
[asearcy@cabq.gov](mailto:asearcy@cabq.gov) / (505) 768-5153

Library's ILS system is Symphony and they have been a valued Ingram customer since 1979. In 2023, Ingram shipped out close to 13,000 units, worth nearly \$200,000 in annual purchases. Through EDI ordering, they receive full shelf-ready materials with most of their purchases being Trade Hardcover and Quality Paperback titles.

3. **Jefferson Parish Library** (Louisiana)  
Breagh Wirth, Collection Development Librarian  
[bwirth@jefferson.lib.la.us](mailto:bwirth@jefferson.lib.la.us) / (504) 609-2972, ext. 2841

Library's ILS system is Symphony, and they are set up for EDI ordering. They take advantage of Ingram's complimentary Standing Order programs and receive shelf-ready materials.

**21. What kind of quality control do you provide?**

Ingram includes test orders at the beginning of each project to confirm MARC records, customer item line holdings, physical processing, and FTP transfer of files. For Test One Processing and Cataloging, Ingram sends profiles and samples per binding type for Library approval. Test Two Processing and Cataloging is based on actual orders placed by the Library.

At the beginning of every shelf-ready project, we audit 100% of all orders. The first production order is treated as a test order and every care is taken to ensure it is correct before proceeding. New associates in both cataloging and processing are audited for their first 60 days and then periodically and as needed.

Ingram's standards and quality control measures help ensure that cataloging errors are rare; we understand the importance of maintaining a database with records matching your specifications. If the Library receives an Ingram record that does not meet your specifications, Ingram will credit the Library for the cost of the record or correct the error at no additional charge, whichever the Library prefers. We work with the Library to identify and correct errors quickly and accurately.

**22. How much work typically needs to be done locally after the cataloged and processed items are received by MVL? Provide specifics.**

After all needed cataloging records are created per a specific order; they are transmitted via FTP to a designated library staff member, who is responsible for loading the new records.

When the order is physically received at the local agency, the Library can move the items from "in process" status to "available for check-out" status.

We occasionally come across items that fall outside the library's profiling specification; these may be sent uncatalogued and unprocessed.

**23. Does vendor charge more for cataloging and processing for items vendor does not supply? Does vendor accommodate drop-shipping from "direct-order" publishers for purposes of cataloging and processing?**

Ingram cannot accept third-party materials.

**24. Does the vendor access MVL's database for cataloging online, or use a copy of the database loaded on vendor's computer? What are the advantages and disadvantages of vendor's method?**

Ingram will utilize a Z39.50 protocol to access the Library's database. The advantage of this method is we get a live, up-to-date view of the Library's holdings.

**25. How do you handle orders that are NOT on the vendor-provided selection lists?**

Ingram supplies titles from all major publishers and their imprints. Ingram also provides reference, scientific, medical, technical, legal, and other academic and non-trade titles, including materials from University and association presses, small press, and specialty publishing houses.

Should the Library order books not currently inventoried by Ingram, we will attempt to order the book if available on the open market through normal U.S. wholesale channels. Turnaround time is dependent on publisher availability.

Ingram can provide titles that are in print and available from the publisher. Some publishers choose to sell only directly to end users such as schools or libraries. These direct-only publishers are defined as those publishers whose titles are not available on the open market to distributors. The Ingram Collection Development team has relationships with publisher representatives and meet with them often to review their offerings and determine suitability for libraries.

In addition to complimentary Collection Development services, Ingram also provides fee-based fully custom curation, wherein our Collection Development Librarians create lists precisely based on your Library's needs. With custom curation, we provide ongoing custom lists, generally done for one part of a collection for a temporary period, or indefinitely. Also included are one-time ad hoc custom lists based on customer requirements. The Library will specify parameters for the lists including, but not limited to, bindings, inclusions, exclusions, and timing for delivery of lists. The service includes holdings analysis, de-duped against library holdings or titles previously sent (for ongoing list projects). With custom curation, Ingram librarians perform as if we are members of your library staff.

**26. What qualifications are typically required of your collection development staff? Cataloging staff?**

Ingram has 37 master's-degreed librarians on staff. They all have years of experience working in and with libraries, and the Collection Development librarians have a minimum of five years of collection development experience in public libraries.

Members of the team have participated in local, state, and national library conferences and have presented on collection development, forthcoming books, the elements of a good picture book, selection tools, library marketing, Dewey versus BISAC organizational schema, library technology, handling difficult patrons, library staff development, and more.

A Cataloger requires an ALA Accredited Master of Library Science, 3 years original cataloging experience at the professional or paraprofessional level in a library or library vendor setting, 1 year of work experience using OCLC and an integrated library system, and demonstrated expertise with AACR2/RDA, LCSH, LC or Dewey classification schedules, and MARC21/OCLC formats.

**27. Which review journals are used in the vendor's selection process? Which of these review journals provide full text reviews for library selectors, and how soon after publication is the review available in the selection database?**

ipage currently includes review citations and full text reviews from the following journals:

- *Booklist*
- *The Bulletin of the Center for Children's Books*
- *Foreword Magazine*
- *Hornbook Guide*
- *Hornbook Magazine*
- *Library Journal*
- *Kirkus*
- *School Library Journal*
- *Publishers Weekly*
- *Shelf Awareness*
- *BookPage*
- *BlueInk Review*

*\*Please note the above list of journal titles is subject to change at any time.*

While not all titles on ipage have reviews, we display all published reviews for print titles as soon as they are available. If you wish to view full-text reviews, we charge a nominal fee of \$374.92 per year for the additional service, for which you can choose to pay monthly installments of \$37.49. Price of reviews is subject to change on an annual basis. (This is currently not taxable in the State of California but is subject to change. Tax will be applied if/when California requires tax on data.)

Ingram's MLS-degreed librarians use their public library selector experience, and tracking trends that impact reading behavior, to identify titles you need for a well-balanced, diverse, relevant, high-circulating collection.

**28. Please provide a sample copy of your profile(s) form for collection development, or a link to an online sample.**

We have included a sample Opening Day Collection Profile Form with this response.



**29. Please describe any retrospective collection development or collection expansion service vendor provides and an explanation of how the cost is calculated.**

**iCurate Core: Essential Collection Gap Analysis**

From time-to-time, we know our collections are missing key titles/sections and have become imbalanced, and we want to locate and identify those gaps. Ingram's Collection Development librarians all have worked in public libraries and have struggled with these issues first-hand. That is why we created iCurate Core: Essential Collection Gap Analysis for the public library. This service allows a library to rebalance their Adult, Teen, and/or Children's collections with a one-time list suite of essential titles that they are currently missing.

The lists come in an Excel list format with value-added information and estimated actual customer pricing to make it easier to budget when ordering. Besides standard fields such as title, author, publisher, EAN, Dewey, BISAC, pricing information, and more, the lists include fiction genre category and public library ranking to help prioritize purchases. Your holdings are marked so that you can determine if you want to purchase additional copies of a title or replace a worn version. You can order via your usual means or by emailing the spreadsheet to Ingram's Customer Care team for ordering.

- **Adult Lists:** Adult Fiction; Adult Graphic Novels; Adult Nonfiction 000s – 900s and Biographies (11 lists)
- **Children's Lists:** Board Books; Picture Books; Easy Nonfiction; Easy Reader Fiction; Easy Reader Nonfiction; Juvenile Fiction; Juvenile Graphic Novels; Juvenile Nonfiction
- **Teen Lists:** Teen Fiction; Teen Graphic Novels; Teen Nonfiction

We can match your holdings by author/title and show if your library already owns a particular title in a different binding, such as hardcover versus paperback. Occasionally the metadata may not match between bindings, or the EAN in your catalog has been out of print long enough that it is no longer in our database. In those cases, we will not be able to match different bindings, and the title on your list may appear as un-held.

You can purchase iCurate Core lists once, every few years, or annually. They provide a starting point to show which essential and popular titles are missing from your collection so that you don't have to spend weeks or months analyzing the collection and searching for replacement titles. Also useful after large, annual weeding projects to replace essential titles previously withdrawn due to poor condition. Pricing: \$1,000 each for Adult, Children's, or Teen, or \$2,800 for All Ages.

**iCurate Custom: Opening Day Collections (ODCs)**

Undertaking a library expansion can be a massive endeavor. From selecting an architect to anticipating delivery dates, the magnitude of such a project can feel overwhelming.

That's why Ingram Library Services created the **READY** program for ODCs. When you get **READY** with Ingram, you can relax, knowing that you've partnered with an expert ODC management team.

With **READY**, we've combined Reliable Specialists, Expert Collection Development Librarians, Accurate Cataloging and Processing, and Detailed Delivery Arrangements into one seamless process so that You rest easy.

- **Reliable Specialists:** Together, we will complete a meticulously refined service success plan that helps us understand your distinct library needs every step of the way. Consistent communication and scheduled check-ins allow us to work as an extension of your staff. As partners on this project, we take everything, from building design to delivery, into consideration.
- **Expert Collection Development:** The expertise of our collection development librarians is at your disposal throughout the collection process. We collaborate with your team to provide as much—or as little—guidance as you desire and work tirelessly to build hand-selected custom lists tailored to help you meet your community's unique needs.

- **Accurate Cataloging & Processing:** MLS-degreed librarians and veteran processors adhere to your specifications throughout a custom-made setup process so that all titles match your classification requirements. This truly customized C&P means your titles arrive shelf-ready exactly as needed for immediate circulation.
- **Detailed Delivery:** Ensuring the accuracy of arrival logistics is top priority. Once processed titles have passed quality control inspection, we proceed with a fine-tuned operation for sorting, organizing, boxing, protecting, and scheduling transport of your collection materials. We ship at your discretion and coordinate delivery procedures that include options for shelving and unboxing.
- **You Rest Easy:** Whether you need 1,000 or 1,000,000 titles, we want you to rest easy on Opening Day. We manage and carefully ship your order based on your specifications. But reliable service does not end at delivery. We remain in contact to respond to questions or additional needs and to continue to offer support.

Ingram wrote the book on Opening Day Collections—literally—and when you start a project with us, we provide you with our *ODC Handbook*. Packed with helpful resources, such as shelving allocations, budget spreading tools, expert tips & tricks, the process of working with Ingram on an ODC, planning for delivery, and more, Ingram's ODC Handbook is your guide to every step of an ODC project. It includes:

#### **Interactive Resources**

- Library ODC Project Checklist
- Collection Development ODC Profile
- Interactive Budget Spread Tool
- Shelving Formulas
- Physical Processing Checklist

#### **Planning & Project Management**

- Define materials budget.
- Consider building and construction factors.
  - Is the shelving plan in place?
  - Will there be an existing collection integrated with new materials?
  - What is the possession date?
- Define the delivery schedule and receiving workflow.
- Discuss sorting options.

#### **Budgeting & Space Allocation**

- Build a shelving plan.
- Allocate funding for cataloging, processing, and shelving.
- Discuss contingency plans for skyrocketing circulation.

#### **Cataloging & Processing**

- Determine C&P requirements by collection.
- Test physical materials.

#### **Selection & Ordering**

- Complete Collection Development ODC Profile.
- Discuss requirements, answer questions, and confirm needs.
- Define a timeline for receiving lists, selecting materials, and ordering your collection.
- Receive lists from (y)our MLS-degreed librarians.
- Select titles and quantities. Return lists for ordering.

#### **Account Management & Delivery**

- Receive one complete shipment or multiple batched shipments.

- Discuss delivery date(s) and freight carrier details.
- Determine summary invoicing and timeframe.
- Assess project.

Ingram's proprietary *ODC Handbook* walks you through each important step of the process, from budgeting, to allocating shelf space, to celebrating milestones. Not only is it a tool to ensure a successful project, but it also informs your administration and funding partners of the project. We know that the collection is just one part of a building, renovation, or refresh project, but we don't want you to sweat the details alone.

By providing a Project Manager backed up by a team of Collection Development librarians, experienced catalogers, and processing professionals, we can serve as additional staffing so that your project goes smoothly from concept to opening day reveal. We want you to think of our staff as extensions of your local team, ready and willing to make your project successful.

The Project Manager executes the project on your timeline and within your budget. The Project Manager forgets no detail and ensures there are no surprises along the way. We know that your time will be stretched during this project because your day-to-day activities will likely not be lessened.

Therefore, we ensure you can remain focused on your primary duties, and we make sure everything stays on track. We'll inform you of any need to adjust expectations based on construction delays, funding changes, or other unscheduled events.

We know that every ODC project is different, things often change mid-stream, and unforeseen events occur. We understand that and will work through all of it with you.

The opening of a library is a complex process involving many different people, groups, and organizations working together. Ingram Library Services strives to deliver the best ODC to each of our library customers.

- ✓ The selection lists (carts) generated are the highest quality with the most relevant information presented. After our Collection Development librarians have a complete and thorough understanding of the library's community and patronage, they create the lists with a goal for 50% of the material selected to circulate in the first 180 days.
- ✓ We process and catalog your materials to your exact specifications. Ingram's Account Services team works with the library to ensure understanding of all specifications and to address any anomalies. Ingram strives for 100% accuracy of Cataloging and Processing for each ODC delivered.
- ✓ We deliver materials on the date and to the location the library specifies and in compliance with the library's wishes. Ingram has personnel on-site for delivery.

In the first days of your project, Ingram's Project Manager helps you to complete your C&P profile and to establish your accounts. The C&P portal provides Ingram an in-depth view of your C&P requirements for the project.

If Ingram does not already catalog and process your items, or if you need different cataloging and/or processing services, we ask you to complete the portal. To ensure accuracy and functionality, the Ingram team provides items for testing before processing the entire collection.

Once your C&P specs are complete, we ask that you complete a Collection Development profile, which helps us understand the parameters and details of your project.

After the profile is complete, Ingram's Collection Development team schedules a conference call with your staff to discuss how you would like your lists to be created. Lists will be split according to C&P requirements and/or your preferences.

We help you create a timeline for our tasks and yours, accommodating your needs and ensuring materials arrive by your target date.

Ingram's experienced librarians create selection lists based on a popular collection, unless otherwise directed by the customer. Before deciding on the appropriate mix of titles for your lists, we are happy to consult with your selector to become familiar with your library's Collection Development philosophy.

The selection lists are approximately one and a half times your stated dollars or units to allow for your flexibility, and we deliver them via Excel spreadsheets with sorting and filtering capabilities.

Excel Selection Lists contain standard metadata fields, Public Library sales ranking, and a running estimated total of items chosen. The Cumulative Cost dollar total along the top of the spreadsheet is an *approximate* dollar amount based on quantity ordered, discount, and any cataloging & processing charges.

Other columns include a hyperlink to the iPage listing for the chosen title, two subject headings, and one citation (where available).

We understand that either with a brand-new building or a newly renovated reopening, your library has as many specific needs as the books to be housed inside. In our years of ODC experience, we have accommodated a variety of different delivery types and help your team plan a delivery schedule that helps set up your new library up as quickly and as painlessly as possible. During the project, ODC materials are processed and stored separately from non-ODC materials.

Often, you and your team will find it easier to receive the entirety of the project at one time. However, if you find it easier to receive materials in smaller chunks (rather than an entire truckload of books), we also offer the option of shipping your materials as they are completed.

For your ODC, we can accommodate your individual library shelving needs:

- **Rough Sort:** This service is a standard feature we provide for each ODC project we undertake. You will receive all your ODC materials organized by collection. For example, you won't have to sort through a box that contains both Adult Nonfiction and Juvenile Fiction.
- **Strict Sort:** For a fee (currently \$.90 per unit), we can go a step further when boxing your materials. In this type of sort, not only do we box your orders by collection, but we will also place your new titles in Dewey Order so that each book is strategically placed in a "shelf-ready" order. Just open the boxes and place the books on your shelves!

Ingram Library Services' pledge is to make the selection and delivery of materials the easiest and best part of the ODC process. Pricing: Complimentary if Ingram-created lists are purchased solely from Ingram.

### **30. Do you provide an option to download full Library of Congress authority records?**

All authorities are accurate at the time of record creation. If the Library is ordering older titles and not paying for record customization, the authority may be out of date. Real-time updates are on our development roadmap.



## Proposal Form - Submittal #3: Discounts

Notes: Please indicate when the discount varies based upon number of copies ordered.

<u>Items</u>	<u>Tiered Discount %</u>
1. General Trade Books	46.5%
2. "Short Discount" Items	10.0%
3. Mass Market Paperbacks	40.5%
4. Small Press	10.0%
5. Compact Discs	5.0%
6. DVDs	15.0%
7. Large Print Books	0-46.5% (depending on binding type)
8. International Language Books	0-46.5% (depending on binding type)
9. Unabridged Audiobooks on CD	46.0%
10. Continuation Plan titles	0-46.5% (depending on binding type)
11. Bestsellers	0-46.5% (depending on binding type)
12. Children's Hardcover Items	46.5%
13. Children's Library Bindings	21.5%

<u>Items</u>	<u>Flat Rate Discount %</u>
1. Print Materials	N/A (Discounts are not based on number of copies ordered.)
2. Non-Print Materials	N/A (Discounts are not based on number of copies ordered.)

### Ingram's full Discounts and Definitions:

* Trade Hardcover.....	46.5%
* Quality Paperbacks.....	40.5%
* Mass Market Paperbacks .....	40.5%
Graphic Novels .....	10.0–30.0%
Publisher Binding and Library Bindings.....	21.5%
Prebound.....	35.0%
University Press.....	10.0%
** Short Discounted / Non-Trade Titles.....	10.0%
*** Spoken Word Audio .....	0–46.0%
Music.....	0–5.0%
Video Games .....	0–5.0%
DVD/Blu-ray .....	0–15.0%
Net Titles .....	0.0%

\* Ingram's standard Low Price Point discount: Trade Hardcover, Quality Paperbacks, and Mass Market Paperback titles ordered with a cover price of \$14.99 or less will receive a 25% discount.

\*\* Short Discount/Non-Trade: Lower demand, small print-run books in various bindings, and includes graphic novels, legal, technical, reference, scientific, and medical titles as defined by Ingram subject categories. Titles are generally published by small or university presses. Also included are print and audiobook titles purchased at lower than full trade discount; titles with limited sales volume; and/or titles from publishers not in compliance with Ingram's purchasing requirements. Ingram is pleased to make this broad base of titles available to our customers with no service charges.

\*\*\* Eighty to eighty-five percent of all Spoken Word Audio is at the 46% discount; however, some Spoken Word Audio is short discounted by the publisher.

Publishers/manufacturers, not Ingram, set list prices of individual library materials. We, therefore, cannot guarantee the retail/list price of an item will not change during the term of the contract. Prior to placing an order, the Library can determine a title's estimated discount by utilizing the "Price this List" or Quotation features on ipage.

In determining which titles receive less than full trade discounts, Ingram categorizes books for pricing purposes by considering the binding, cost of acquisition, general marketing categories, publisher's discount, and other factors as defined by the Definitions of Binding Types and Presses provided. Ingram reserves the right to be the sole and final determinant of the pricing category.

It is noted that the Library is not exempt from State of California Sales and Use Tax. Tax will be charged to the Library when billed.

### Definitions of Binding Types and Presses

**Trade Hardcover:** High demand fiction and nonfiction books published with a glued binding and a hardcover. These titles are typically for the general consumer and produced by widely distributed publishers. Trade bindings may also be referred to as retail trade editions, trade books, hardbound books, hardback books, cloth bound books or cloth cover books. Publishers normally produce these titles in larger print runs. \*

**Quality Paperback:** High demand fiction and nonfiction books with paper covers and generally no size restriction. Any illustrations or graphics may be placed throughout the book; both paper and printing are high quality. These titles are typically for the general consumer and produced by widely distributed publishers. This binding may also be referred to as trade paper or trade paperback. \*

**Mass Market Paperback:** High demand books with paper covers that are produced in a size to fit a standard retail store display and generally deal with subjects of mass appeal. Any illustrations are grouped together in one section of the book. \*

**Graphic Novels:** A narrative work in which the story is conveyed to the reader using comic form. The term is employed in a broad manner, encompassing nonfiction works and thematically linked short stories as well as fictional stories across several genres.

**Library Bindings:** Books of higher quality publisher bindings, usually fanned and glued, and may also be sewn. Books may be identified as Library Bindings on ipage.

**University Press:** The binding types may vary for these titles (i.e., Hardcover and/or Paperback), but all are published by a University Press.

**Short Discounted/Non-Trade:** Lower demand, small print-run books in various bindings, and includes graphic novels, legal, technical, reference, scientific, and medical titles as defined by Ingram subject categories. Titles are generally published by small or university presses. Also included are print and audiobook titles purchased at lower than full trade discount; titles with limited sales volume; and/or titles from publishers not in compliance with Ingram's purchasing requirements. Ingram is pleased to make this broad base of titles available to our customers with no service charges.

**Large Print:** Ingram does not recognize large print as separate binding type for discount purposes. Large print titles receive discounts according to binding/press assigned to the ISBN ordered as outlined above.

**Picture Books, Board Books, Easy Readers, and Big Books:** These juvenile genre categories are not discounting categories used by Ingram. These books will receive the discount appropriate to the specific binding/press ordered as outlined above. We estimate that at least 80% would receive the full trade discount.

**Prebound Books:** Paperback books bound into a hardback edition. Our inventory also includes over 17,500 prebound titles from Perfection Learning and San Val (Turtleback Books) and are identified on ipage as Prebound-Sewn or Prebound-Glued.

**World Language Materials:** Ingram does not recognize Spanish language (or any world languages) as a discounting category. These books will receive the discount appropriate to the specific binding/press ordered as outlined above.

**Net:** Low demand, small print run books in various binds and categories upon which Ingram receives minimal or no purchase discount. This category of book will receive a 0% discount. Ingram is pleased to make this broad base of titles available to our customers with **no service charges**.

*\* See Short Discount for explanation on titles that may fall outside of this discount category.*

## Proposal Form - Submittal #4: Bid

Vendor must provide information for the following bid line items. Costs must be firm and remain in effect for a minimum of twenty-four (24) months following date of contract signing. No change orders or other changes to costs provided can be allowed for this contract.

Cost must be provided to address each line item listed below and all costs must include shipping, handling, and insurance. Please indicate if tax is to be charged, and include.

### 1. Collection Management:

a. Online Selection List Loader, if any, with initial setup cost.	No initial setup fee.
b. Online Selection List, per list cost (if cost varies by Frequency, indicate each cost).	<p>In addition to fee-based Collection Development options, complimentary Collection Development is available through our Standing Order/New Title notification programs on ipage, as well as an assortment of ipage lists curated and maintained by Ingram's MLS-degreed Collection Development librarians.</p> <p>One-time ad hoc custom curation lists — no charge</p> <p>On-going custom curation lists — pricing based on list requirements</p>
c. "Vendor Selection Ordering" per collection or subject area.	\$1.25 per unit for vendor selection, plus applicable collection development list fees.
d. Pricing for Selection databases such as iPage, BIBZ.com, Title Source 3. How many users are included; and what is the cost for additional users, if applicable. Include all tiered plan offerings, subscription setup, renewal, SirsiDynix Symphony interface, and other costs.	An iPage subscription is free for unlimited, concurrent users.

Tax will be charged on product and processing when the Library is billed. Electronic lists are currently not taxable in the State of California but is subject to change. Tax will be applied if/when California requires tax on these.

### 2. Ordering:

**a. Online ordering, initial preparation cost.**

**b. Ongoing costs associated with online ordering, if any.**

Ingram does not assess any fees associated with ordering.



**3. Cataloging:**

- a. Any costs associated with initial setup. Quote any costs for setup of audiovisual cataloging and processing as separate, optional costs.**

Ingram does not assess any fees associated with initial cataloging setup. *Please note:* Ingram does not currently offer cataloging and processing for audiovisual materials.

- b. Cataloging per MVL specifications (see Appendix A samples) per item (added copy):**  
**c. Cataloging per MVL specifications (see Appendix A samples) per item (original/new title):**

**Books (original/new title): .....\$2.42/unit**

This is based on an average of 1 copy and includes following services:

- Cataloger Intervention
- Hard Edits
- Easy Edits
- BookMARC record
- Originals
- Upgrades

**Books (added copy): .....\$2.85/unit**

This is based on an average of 1 copy and includes following services:

- Best available MARC record
- Z39.50 (up to 3 searches)

- d. Authority control records per bibliographic record.**

Ingram does not currently provide Authority MARC Records.

- e. Ongoing cost associated with downloading of above cataloging records, if any cost involved (specify Internet, FTP, and other options)**

Any costs associated with downloading cataloging records is included in the shelf-ready pricing above. We can deliver cataloging records via FTP, email, or through ipage.

The cataloging pricing we have provided in this section is based on our interpretation of the specifications provided with this RFP. Pricing above is based on an average of 1 copy, which we realize is subject to change.

We suggest a review of all specifications upon award to develop pricing and ensure that cataloging and processing services provided by Ingram continue to meet the requirements of the Mission Viejo Library.

- f. Cost, if any, to provide data to submit to OCLC for additions and deletions.**

If the Library requires OCLC holdings updates, Ingram can provide this service with an OCLC Data Sync Collection. There is no charge for this service. If the Library requires OCLC records in return, Ingram can provide this with a third-party agreement for Ingram to upgrade records in OCLC Connexion.

#### **4. Processing (as specified in Appendix B samples of this RFP)**

Ingram will provide processing services for Hardbound books, Board books, Paperbound books (Trade), and Mass market paperback books for the following fee:

**(Print Materials): ..... \$2.05 per unit, plus tax**

This is based on an average of 1 copy and includes following services:

- Barcode
- Barcode Protector
- Property Stamp (2)
- Date Stamp
- Mylar jacket – Taped
- Spine Label
- Spine Label Protector
- Genre Labels
- Genre Label Protector
  
- (Ingram will also apply 5 mil laminate to Quality Trade paperbacks for an additional cost of \$2.06/unit, plus tax.)

Prices are based on the use of Ingram's standard inventoried materials. Tax will be charged on product and processing when the Library is billed.

The Library currently has a processing bundle set up for books—for a flat fee of \$2.20 per book (plus tax)—that includes the following components:

- Barcode and Protector
- Outside Spine Tape (Q only)
- Property Stamp (3)
- Mylar Jacket, Taped
- Vinyl Pockets (for books with CD's)

#### **5. Invoicing**

Ingram does not assess any fees associated with invoicing—electronic or print.

#### **6. Other costs**

##### **Hard-To-Find Books**

Titles ordered under our optional Hard to Find Books Service ship from Alibris's distribution facility, not an Ingram warehouse. They will not combine with your Ingram orders for shipping and may have different turnaround times and shipping methods. These titles are sold at the net price shown, plus a \$3.95 per book shipping and handling fee if shipped within the United States.

Pricing in this proposal will remain firm for the initial twenty-four months following date of contract signing. Ingram reserves the right to review cataloging and processing pricing with the Library on an annual basis following the initial contract term. Any price increase will be mutually agreed upon between Ingram and the Library.

## Proposal Form - Submittal #5: Average Fill Rate Information

Note: This response should be predicated on libraries with which your company does business in an amount of \$50,000 – \$300,000 per year. Fill Rate should be the time from when vendor received order online from library until library receives both processed and cataloged item and catalog record.

**1. “FIRST HIT” (Items in Stock) Percentage Rate:**

**2. Overall Fill Rate 90 Days:**

Ingram’s initial fill rates are usually 85–90%, with a fill rate of 95–100% shipped or reported within 90 days, on the more than 19 million titles available in Ingram’s database.

**3. Number of days for receipt by MVL of “shelf-ready” library materials in stock (in days)**

Our turnaround time for in-stock, shelf-ready, custom cataloging orders is 7–10 working days from receipt of order to shipment.

**4. Number of days for MVL to receive “shelf-ready” library materials in stock on “priority” rush status (in days)**

Ingram defines a “rush” order as one requiring immediate turnaround and special shipping. They are typically smaller than regular orders, do not receive processing or cataloging services, and they do not accept backorders.

Ingram can accept “rush” orders via toll-free telephone. All orders receive immediate online order entry, as well as instant title and stock verification. Rush orders will be shipped via UPS or other Ingram selected freight method.

Ingram does not charge additional freight for orders that ship with your regularly scheduled shipments via standard transportation. Only rush orders requiring next day delivery incur a freight charge.

Our customers do not often need next-day delivery. However, should the Library require expedited services, with minimal processing and no cataloging, we are happy to discuss your requirements and to profile your accounts accordingly.

Items placed on a separate Rush account will be invoiced as shipped. If the Library profiles the account to receive no backorders, then the items in stock would ship and all other items cancel. The Library would then receive one invoice for the purchase order. Rush orders would ship from a single distribution center exclusively.

If the Library defines “rush” orders differently—such as requiring cataloging and processing AND faster turnaround time than standard 10 days—we are happy to discuss how we can profile your account(s) to meet your requirements.

**5. Number of days delay for MVL to receive uncatalogued or processed library materials in stock (in days)**

We ship in-stock, non-processed, and non-cataloged book orders within 24 hours or on the same business day if placed before local cut-off time at your designated Ingram distribution center. In-stock processed books not requiring custom cataloging services ship within two to five days of receipt of order.

Additional information:

Continuations and New Title Notification/Standing Order Programs require a backorder period, as we order titles on a pre-publication basis to allow Program customers to be the first to get these titles. Items that do not require cataloging services will ship within 24–48 hours after the title is received into the designated Ingram distribution center.

For titles Ingram inventories but that are temporarily not in stock, Ingram attempts to place an order with the publishers within three (3) business days of receipt of order. Our ability to obtain out of stock titles depends on the item's continued availability from the publisher with whom Ingram buyers have an established relationship.

Ingram does not substitute titles unless the ISBN/EAN has been forwarded to a new edition. Only those items ordered will be shipped.

#### **Fill Rate**

We periodically monitor fill rates for specific libraries, and we have programming in place to accurately calculate fill rate for any customer upon request. Note that our fill rate includes over 19,000,000 available titles.

##### ***Print***

91.78 % shipped at time of initial order

98.92 % shipped in 60 days

99.02 % shipped in 90 days

##### ***Spoken Word***

92.53 % shipped at time of initial order

99.30 % shipped in 60 days

99.44 % shipped in 90 days

##### ***DVD/Blu-ray***

77.85 % shipped at time of initial order\*

97.25 % shipped in 60 days

97.60 % shipped in 90 days

Ingram's average fulfillment rates listed above are for in-print library material. We calculate fill rates for Ingram public library customers and for items available through Ingram at the time of order, excluding items unavailable from the publisher at the time of order.

\*Note that "On Order" stock for DVD titles shown on ipage reflects the inventory level in our vendor's distribution center. Upon order, we receive them in our distribution center within 24 hours.



## Proposal Form - Submittal #6: Cataloging Examples

1. In your Proposal, please provide a minimum of 2 typical sample cataloging records for each of the following formats:

Ingram does not currently offer cataloging for audiovisual materials. Below are sample cataloging records for the following print formats: Adult books (1 fiction, 1 non-fiction); Young Adult books; Juvenile books; Serials.

### Adult Biography

=LDR 01991cam 2200361 i 4500  
=001 on1369999660  
=003 OCoLC  
=005 20240415165041.0  
=008 230223s2023\\paua\\000\\0beng\\d  
=040 \\\$aYDX\$beng\$serda\$cYDX\$dBDX\$dOCLCO\$dUKMGB\$dTnLvILS  
=020 \\\$a9780762484263\$q(hardback)  
=035 \\\$a(OCoLC)1369999660  
=043 \\\$an-us---  
=050 \\4\$aPN2287.B16\$bR69 2023  
=082 04\$a791.4502/8092\$223  
=049 \\\$aIG{dollar}A  
=100 1\\\$aRoyal, Sarah,\$eauthor.  
=245 10\$aA.K.A. Lucy :\$bthe dynamic and determined life of Lucille Ball /\$cSarah Royal ; foreword by Amy Poehler.  
=246 3\\\$aAlso known as Lucy  
=264 1\\\$aPhiladelphia :\$bRunning Press,\$c[2023]  
=300 \\\$aix, 229 pages :\$billustrations (some color) ;\$c24 cm  
=336 \\\$atext\$btxt\$2rdacontent  
=336 \\\$astill image\$bsti\$2rdacontent  
=337 \\\$aunmediated\$bn\$2rdamedia  
=338 \\\$avolume\$bnc\$2rdacarrier  
=520 \\\$a"Full of fresh perspective, gorgeously designed, and richly informative, this is a book on Lucille Ball like none other. With profiles spotlighting the many different facets of the woman, AKA Lucy details how Ball changed the face of comedy and the entertainment industry. It sheds new light on the star's history, from her childhood through hard-scrabble days trying to make it in show business, falling head over heels in love and embarking on one of the great romances of the twentieth century, to becoming the biggest star in the world, a pioneer in television, and an icon for the ages. Filled with photos and highlighted by bright illustration and design, this is a volume almost as vivid and entertaining as the woman herself"--\$cProvided by publisher.  
=600 10\$aBall, Lucille,\$d1911-1989.  
=650 \\0\$aActresses\$zUnited States\$vBiography.  
=650 \\0\$aComedians\$zUnited States\$vBiography.  
=650 \\0\$aEntertainers\$zUnited States\$vBiography.  
=655 \\7\$aBiographies.\$2lcgft  
=700 1\\\$aPoehler, Amy,\$d1971-\$ewriter of foreword.  
=999 \\\$zILS902783968

### Adult Fiction

=LDR 01978aam 2200337 i 4500  
=001 \\2023049047

=003 DLC  
=005 20240306082127.2  
=008 231019s2024\\nyu\\000\\1\\eng\\d  
=010 \\\$a 2023049047  
=020 \\\$a9780593493434\$q(hardcover)  
=020 \\\$z9780593493441\$q(ebook)  
=035 \\\$a(OCOLC)1382525236  
=040 \\\$aDLC\$beng\$serda\$cDLC\$dTnLvILS  
=042 \\\$apcc  
=050 00\$aPR6106.R457\$bH86 2024  
=082 00\$a823/.92\$223  
=100 1\\\$aFrench, Tana,\$eauthor.  
=245 14\$aThe hunter /\$cTana French.  
=264 \\\$1\$aNew York :\$bViking,\$c[2024]  
=300 \\\$a467 pages ;\$c24 cm  
=336 \\\$atext\$btxt\$2rdacontent  
=337 \\\$aunmediated\$bn\$2rdamedia  
=338 \\\$avolume\$bnc\$2rdacarrier  
=520 \\\$a"It's a blazing summer when two men arrive in a small village in the West of Ireland. One of them is coming home. Both of them are coming to get rich. One of them is coming to die. Cal Hooper took early retirement from Chicago PD and moved to rural Ireland looking for peace. He's found it, more or less: he's built a relationship with a local woman, Lena, and he's gradually turning Trey Reddy from a half-feral teenager into a good kid going good places. But then Trey's long-absent father reappears, bringing along an English millionaire and a scheme to find gold in the townland, and suddenly everything the three of them have been building is under threat. Cal and Lena are both ready to do whatever it takes to protect Trey, but Trey doesn't want protecting. What she wants is revenge. From the writer who is "in a class by herself," (The New York Times), a nuanced, atmospheric tale that explores what we'll do for our loved ones, what we'll do for revenge, and what we sacrifice when the two collide"--\$cProvided by publisher.  
=650 \\\$0\$aFamilies\$vFiction.  
=650 \\\$0\$aMurder\$xInvestigation\$vFiction.  
=650 \\\$0\$aRevenge\$vFiction.  
=655 \\\$7\$aNovels.\$2lcgft  
=655 \\\$7\$aPsychological fiction.\$2lcgft  
=999 \\\$zILS22303761

**Adult Non-Fiction**

=LDR 01021nam 2200289 i 4500  
=001 in902591721  
=005 20240415164940.0  
=008 230606s2023\\nyua\\000\\0deng\\d  
=020 \\\$a9781324093060  
=035 \\\$a(OCOLC)1366123515  
=040 \\\$aTnLvILS\$beng\$cTnLvILS\$serda\$dTnLvILS  
=043 \\\$ae-uk---  
=050 \\\$4\$aML421.B4\$bM245 2023  
=082 04\$a779/.9782421660922\$223  
=100 1\\\$aMcCartney, Paul,\$eauthor,\$ephotographer.  
=245 10\$a1964 :\$beyes of the storm /\$cPaul McCartney ; introduction by Jill Lepore.  
=246 3\\\$aNineteen sixty-four

=264 \1\$a[New York, New York] :\$bLiveright Publishing Corporation,\$c2023.  
=300 \\\a335 pages :\$billustrations ;\$c30 cm  
=336 \\\a\$text\$btxt\$2rdacontent  
=336 \\\a\$still image\$bsti\$2rdacontent  
=337 \\\a\$unmediated\$bn\$2rdamedia  
=338 \\\a\$volume\$bnc\$2rdacarrier  
=610 20\$aBeatles\$vPictorial works.  
=650 \0\$aRock musicians\$zGreat Britain\$vPictorial works.  
=650 \0\$aNineteen sixty-four, A.D.\$vPictorial works.  
=999 \\\zILS902591721

### **Juvenile Biography**

=LDR 02902pam 2200445 i 4500  
=001 \\\2023011339  
=003 DLC  
=005 20240415163906.0  
=008 230518s2024\\\caua\\\b\b\\\000\0beng\\\  
=010 \\\a 2023011339\$z 2016059375  
=020 \\\a9781452145433\$q(hardcover)  
=040 \\\aDLC\$beng\$erda\$cDLC\$dTnLvILS  
=042 \\\a\$apcc  
=043 \\\a\$e-uk---\$ae-gw---  
=050 00\$aQB36.H58\$bT87 2024  
=082 00\$a520.92\$aB\$223/eng/20230518  
=100 1\$aTurner, Pamela S.,\$eauthor.  
=245 10\$aComet chaser :\$bthe true Cinderella story of Caroline Herschel, the first professional woman astronomer /\$cby Pamela S. Turner ; illustrated by Vivien Mildenerger.  
=264 \1\$aSan Francisco :\$bChronicle Books,\$c[2024]  
=300 \\\a1 volume :\$bcolor illustrations ;\$c29 cm  
=336 \\\a\$text\$btxt\$2rdacontent  
=336 \\\a\$still image\$bsti\$2rdacontent  
=337 \\\a\$unmediated\$bn\$2rdamedia  
=338 \\\a\$volume\$bnc\$2rdacarrier  
=504 \\\aIncludes bibliographical references.  
=520 \\\a"Once upon a time there lived a girl who swept floors and washed dishes, and was little more than a servant to her family. Until, one day, an invitation arrived. It was an invitation to a new country and a new beginning--a place where Caroline's dreams, her fascination with the night sky, and her extraordinary talent would open up a world of beauty and renown, and make her the belle of the scientific ball. From humble beginnings and in spite of many obstacles, Caroline Herschel and her brother William developed and built the best telescope in the world--in their back yard! Together they went on to discover a new planet, new moons, and vast arrays of unknown nebulae and comets. From a child who seemed doomed to a life of servitude, Caroline grew into a woman recognized by kings and queens-and a scientist whose work and discoveries continue to shine today. Pamela S. Turner and Vivien Mildenerger invite readers into Caroline Herschel's true Cinderella story in this inspiring account of the transformative power of curiosity and the magic-better than any fairytale-of science"--\$cProvided by publisher.  
=521 1\$aAges 5 to 8.\$bChronicle Books.  
=521 2\$aGrades 2-3.\$bChronicle Books.  
=588 \\\aDescription based on CIP data; resource not viewed.\$5TnLvILS  
=600 10\$aHerschel, Caroline Lucretia,\$d1750-1848\$vJuvenile literature.

=650 \0\$aWomen astronomers\$zGreat Britain\$vBiography\$vJuvenile literature.  
=650 \0\$aWomen astronomers\$zGermany\$vBiography\$vJuvenile literature.  
=650 \0\$aAstronomers\$zGreat Britain\$vBiography\$vJuvenile literature.  
=650 \0\$aAstronomers\$zGermany\$vBiography\$vJuvenile literature.  
=650 \0\$aComets\$vJuvenile literature.  
=650 \1\$aAstronomers\$zGreat Britain\$vBiography.  
=650 \1\$aAstronomers\$zGermany\$vBiography.  
=650 \1\$aComets.  
=700 1\1\$aMildenberger, Vivien,\$eillustrator.  
=999 \1\$zILS22156635

### **Juvenile (Easy) Fiction**

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=082 04\$a[E]\$223  
=049 \\\$aIG{dollar}A  
=100 1\1\$aDean, Kim,\$d1969-\$eauthor.  
=245 10\$aPete the cat and the missing cupcakes /\$cKimberly and James Dean.  
=246 3\1\$aPete the cat & the missing cupcakes  
=250 \\\$aFirst edition.  
=264 \1\$aNew York, NY :\$bHarper, an imprint of HarperCollinsPublishers,\$c[2016]  
=300 \\\$a1 volume (unpaged) :\$bcolor illustrations ;\$c29 cm.  
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=336 \\\$astill image\$bsti\$2rdacontent  
=337 \\\$aunmediated\$bn\$2rdamedia  
=338 \\\$avolume\$2nc\$2rdacarrier  
=490 1\1\$aPete the cat  
=520 \\\$aPete and his friends must solve a mystery when some of the cupcakes they have backed for a party go missing!  
=600 00\$aPete,\$cthe Cat (Fictitious character)\$vJuvenile fiction.  
=650 \0\$aCupcakes\$vJuvenile fiction.  
=650 \0\$aFriendship\$vJuvenile fiction.  
=650 \0\$aCats\$vJuvenile fiction.  
=600 01\$aPete,\$cthe Cat (Fictitious character)\$vFiction.  
=650 \1\$aCupcakes\$vFiction.  
=650 \1\$aFriendship\$vFiction.  
=650 \1\$aCats\$vFiction.  
=700 1\1\$aDean, James,\$d1957-\$eauthor,\$eillustrator.  
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### **Juvenile Encyclopedia**

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=005 20240415163655.0  
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=082 04\$a590.3\$223  
=245 00\$aAnimals :\$ba visual encyclopedia.  
=250 \\\$aNew edition.  
=264 \\1\$aNew York :\$bDK Publishing,\$c2024.  
=300 \\\$a1 volume :\$bcolor illustrations  
=336 \\\$atext\$btxt\$2rdacontent  
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=588 \\\$aDescription based on publisher data; resource not viewed.\$5TnLvILS  
=521 1\\\$a09-12.  
=521 2\\\$a04-07.  
=520 \\\$aSee the animal kingdom up close and personal in this ultimate reference book for children.  
=650 \\0\$aAnimals\$vEncyclopedias, Juvenile.  
=650 \\1\$aAnimals\$vEncyclopedias.  
=655 \\7\$aEncyclopedias.\$2lcgft  
=710 2\\\$aDK Publishing, Inc.  
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### **Juvenile Graphic Novel Fiction**

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=100 1\\\$aPilkey, Dav,\$d1966-\$eauthor,\$eillustrator.  
=245 10\$aDog man.\$pThe scarlet shedder /\$cDav Pilkey.  
=246 3\\\$aDog man.\$pScarlet shedder  
=246 3\\\$aDog man.\$n12,\$pThe scarlet shedder  
=246 30\$aScarlet shedder  
=250 \\\$aFirst edition.  
=264 \\1\$aNew York, NY :\$bGraphix, an imprint of Scholastic,\$c[2024]

=300 \\\\$a1 volume :\$bchiefly color illustrations ;\$c22 cm.  
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=338 \\\\$avolume\$bnc\$2rdacarrier  
=490 1\\\$aDog man ;\$v#12  
=588 \\\\$aDescription based on publisher data; resource not viewed.\$5TnLvILS  
=521 1\\\$aAges 7 and up\$bScholastic / Graphix  
=521 2\\\$aGrades 2-3\$bScholastic / Graphix  
=520 \\\\$a"P.U.! Dog Man got sprayed by a skunk! After being dunked in tomato juice, the stink is gone but the scarlet red color remains. Now exiled, this spunky superhero must struggle to save the citizens who shunned him! Will the ends justify the means for Petey, who's reluctantly pulled back into a life of crime in order to help Dog Man? And who will step forward when an all-new, never-before-seen villain unleashes an army of A.I. robots?"--\$cProvided by publisher.  
=600 00\\\$aDog Man\$c(Fictitious character)\$vComic books, strips, etc.  
=650 \0\\\$aSuperheroes\$vComic books, strips, etc.  
=650 \0\\\$aSupervillains\$vComic books, strips, etc.  
=650 \0\\\$aGood and evil\$vComic books, strips, etc.  
=650 \0\\\$aDogs\$vComic books, strips, etc.  
=650 \0\\\$aPolice\$vComic books, strips, etc.  
=650 \0\\\$aSkunks\$vComic books, strips, etc.  
=650 \0\\\$aAdventure and adventurers\$vComic books, strips, etc.  
=650 \0\\\$aRobots\$vComic books, strips, etc.  
=650 \0\\\$aTomato juice\$vComic books, strips, etc.  
=650 \0\\\$aRed\$vComic books, strips, etc.  
=600 01\\\$aDog Man\$c(Fictitious character)\$vFiction.  
=650 \1\\\$aSuperheroes\$vFiction.  
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=650 \1\\\$aRobots\$vFiction.  
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=650 \1\\\$aHumorous stories.  
=650 \1\\\$aGraphic novels.  
=650 \1\\\$aCartoons and comics.  
=655 \7\\\$aSuperhero comics.\$2lcgft  
=655 \7\\\$aAction and adventure comics.\$2lcgft  
=655 \7\\\$aHumorous comics.\$2lcgft  
=655 \7\\\$aGraphic novels.\$2lcgft  
=655 \7\\\$aComics (Graphic works)\$2lcgft  
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**Young Adult Fiction**

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=100 1\\\$aSoontornvat, Christina,\$eauthor.  
=245 14\$aThe last mapmaker /\$cChristina Soontornvat.  
=250 \\\$aFirst edition.  
=264 1\\\$aSomerville, Massachusetts :\$bCandlewick Press,\$c2022.  
=300 \\\$a359 pages :\$bmap ;\$c21 cm  
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=338 \\\$avolume\$bnc\$2rdacarrier  
=500 \\\$a"A Junior Library Guild Selection"--Title page verso.  
=520 \\\$a"In a fantasy adventure every bit as compelling and confident in its world building as her Newbery Honor Book A Wish in the Dark, Christina Soontornvat explores a young woman's struggle to unburden herself of the past and chart her own destiny in a world of secrets. As assistant to Mangkon's most celebrated mapmaker, twelve-year-old Sai plays the part of a well-bred young lady with a glittering future. In reality, her father is a conman--and in a kingdom where the status of one's ancestors dictates their social position, the truth could ruin her Sai seizes the chance to join an expedition to chart the southern seas, but she isn't the only one aboard with secrets. When Sai learns the ship might be heading for the fabled Sunderlands--a land of dragons, danger, and riches beyond imagining--she must weigh the cost of her dreams. Vivid, suspenseful, and thought-provoking, this tale of identity and integrity is as beautiful and intricate as the maps of old."--\$cProvided by publisher.  
=650 \0\$aYoung women\$vJuvenile fiction.  
=650 \0\$aSecrecy\$vJuvenile fiction.  
=650 \0\$aCartographers\$vJuvenile fiction.  
=650 \0\$aSocial classes\$vJuvenile fiction.  
=650 \0\$aVoyages and travels\$vJuvenile fiction.  
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=650 \1\$aCartographers\$vFiction.  
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=650 \1\$aFantasy.  
=655 \7\$aFantasy fiction.\$2lcgft  
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**Young Adult Fiction**

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=082 00\$a[Fic]\$223  
=100 1\\\$aStamper, Phil,\$eauthor.  
=245 10\$aAfterglow /\$cPhil Stamper.  
=264 \\1\$aNew York :\$bBloomsbury,\$c2023.  
=300 \\\$a394 pages :\$billustrations ;\$c22 cm  
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=520 \\\$aAfter a summer of life changing, Gabriel, Reese, Sal, and Heath are finally ready for senior year, but as graduation nears and the boys prepare to enter the real world, it is clear their friendship will never be the same.  
=521 1\\\$aAges 13+\$bBloomsbury Children's Books.  
=521 2\\\$aGrades 10-12.\$bBloomsbury Children's Books.  
=650 \\0\$aGays\$vJuvenile fiction.  
=650 \\0\$aBest friends\$vJuvenile fiction.  
=650 \\0\$aFriendship\$vJuvenile fiction.  
=650 \\0\$aYoung adult fiction.  
=650 \\1\$aGay people\$vFiction.  
=650 \\1\$aBest friends\$vFiction.  
=650 \\1\$aFriendship\$vFiction.  
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#### **Young Adult Fiction**

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=100 1\\\$aRiordan, Rick,\$eauthor.  
=245 14\$aThe lightning thief /\$cRick Riordan.  
=250 \\\$aNew paperback edition.  
=264 \\1\$aLos Angeles :\$bDisney/Hyperion,\$c2022.  
=264 \\4\$c{copy}2005  
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=337 \\\$aunmediated\$bn\$2rdamedia  
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=490 1\\\$aPercy Jackson and the Olympians ;\$vone  
=500 \\\$aIncludes excerpts from The red pyramid and The sea of monsters.  
=520 \\\$aAfter learning that he is the son of a mortal woman and Poseidon, god of the sea, twelve-year-old Percy is sent to a summer camp for demigods like himself, and joins his new friends on a quest to prevent a war between the gods.  
=600 10\\\$aJackson, Percy\$c(Fictitious character)\$vJuvenile fiction.  
=600 00\\\$aPoseidon\$c(Greek deity)\$vJuvenile fiction.  
=600 00\\\$aHades\$c(Greek deity)\$vJuvenile fiction.  
=600 00\\\$aZeus\$c(Greek deity)\$vJuvenile fiction.  
=650 \\0\\\$aMythology, Greek\$vJuvenile fiction.  
=650 \\0\\\$aldentity (Psychology)\$vJuvenile fiction.  
=650 \\0\\\$aFriendship\$vJuvenile fiction.  
=650 \\0\\\$aFathers and sons\$vJuvenile fiction.  
=600 11\\\$aJackson, Percy\$c(Fictitious character)\$vFiction.  
=600 01\\\$aPoseidon\$c(Greek deity)\$vFiction.  
=600 01\\\$aHades\$c(Greek deity)\$vFiction.  
=600 01\\\$aZeus\$c(Greek deity)\$vFiction.  
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#### **Young Adult Graphic Novel**

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=100 1\\\$aMatsumoto, Naoya,\$d1982-\$eauthor,\$eartist.  
=240 10\\\$aKaiju{macr}u 8-g{macr}o.\$lEnglish  
=245 10\\\$aKaiju no. 8.\$n9 /\$cstory and art by Naoya Matsumoto ; translation, David Evelyn ; touch-up art & lettering, Brandon Bovia.  
=246 3\\\$aKaiju number eight.\$n9  
=246 3\\\$aKaiju no. 8.\$nnine  
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=264 \\1\\\$aSan Francisco, CA :\$bVIZ Media, LLC,\$c[2024]  
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=490 1\\\$aShonen Jump manga  
=546 \\\$aln English, translated from the Japanese.  
=500 \\\$aTranslation of: Kaiju hachigo.  
=500 \\\$aReads from right to left in the traditional Japanese manga format.  
=500 \\\$a"Parental advisory: contains crude humor and depictions of violence"--Colophon.  
=521 8\\\$aRated: T, Teen.  
=520 \\\$a"With the looming threat of a cataclysm induced by No. 9, the next generation of the Defense Force takes steps to prepare. Reno undergoes training and becomes the first compatible user of No. 6 in history. Kafka sharpens his skills by learning squadron-style combat techniques under Hoshina's tutelage. Meanwhile, Kikoru gets clearance from Narumi to inherit a powerful memento that once belonged to her mother."--\$cPublishers description.  
=650 \\0\$aGraphic novels\$zJapan\$vTranslations into English.  
=650 \\0\$aComic books, strips, etc.\$zJapan\$vTranslations into English.  
=650 \\0\$almaginary wars and battles\$vComic books, strips, etc.  
=650 \\0\$aMonsters\$vComic books, strips, etc.  
=650 \\0\$aSea monsters\$vComic books, strips, etc.  
=650 \\0\$aMetamorphosis\$vComic books, strips, etc.  
=650 \\1\$almaginary wars and battles\$vFiction.  
=650 \\1\$aMonsters\$vFiction.  
=650 \\1\$aSea monsters\$vFiction.  
=650 \\1\$aMetamorphosis\$vFiction.  
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=655 \\7\$aManga.\$2lcgft  
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=655 \\7\$aComics (Graphic works)\$2lcgft  
=700 1\\\$aEvelyn, David,\$etranslator.  
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**Serial**

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02116\$c{dollar}14.95 (single issue)  
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=050 00\$aPS648.S3\$bB4672  
=082 10\$a813/.0876208\$223  
=049 \\\$alG{dollar}A  
=222 \4\$aThe best American science fiction and fantasy  
=245 04\$aThe best American science fiction and fantasy.  
=264 \1\$aBoston ;\$aNew York :\$bHoughton Mifflin Harcourt  
=300 \\\$avolumes ;\$c21 cm  
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=362 1\\\$aBegan in 2015.  
=490 1\\\$aThe best American series  
=500 \\\$a"A Mariner original."  
=500 \\\$aEdited by: Joe Hill, 2015; Karen Joy Fowler, 2016; Charles Yu, 2017 ; series editor, John Joseph Adams, 2015- .  
=500 \\\$aPrevious edition, 2015, cataloged as monograph in LC.\$5DLC  
=588 0\\\$a2016; title from title page.  
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=650 \7\$aFICTION / Anthologies (multiple authors)\$2bisacsh  
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=700 1\\\$aYu, Charles,\$d1976-\$eeditor.  
=710 2\\\$aHoughton Mifflin Harcourt Publishing Company.  
=830 \0\$aBest American series.  
=776 08\$iE-book:\$tBest American science fiction and fantasy\$x2573-0800\$w(DLC)  
2017201354\$w(OCOLC)986788441  
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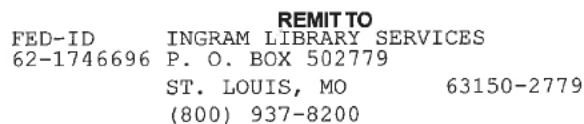
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=246 13\$aJ.A.C.L.  
=260 \\\$aBeytepe, Ankara, Turkey ;\$bDept. of American Culture and Literature, Hacettepe University  
=300 \\\$av. ;\$c24 cm.  
=362 1\\\$aBegan with 1992 issue.  
=500 \\\$aEach issue has also a distinctive title.  
=500 \\\$alssues for 1992 and 1993 lack serial title.  
=500 \\\$aDescription based on: 1994.  
=550 \\\$alssues for 1994- published in conjunction with: The Poetry/Rare Books Collection, State University of New York at Buffalo.  
=650 \0\$aAmerican literature\$y20th century\$xHistory and criticism\$yPeriodicals.  
=651 \0\$aUnited States\$xCivilization\$yPeriodicals.  
=710 2\\\$aHacettepe {uml}Universitesi.\$bAmerikan K{uml}ult{uml}ur{uml}u ve Edebiyan B{uml}ol{uml}um{uml}u.  
=710 2\\\$aState University of New York at Buffalo.\$bPoetry/Rare Books Collection.  
=850 \\\$aMH  
=852 \\\$xuniversal pattern  
=853 00\$81\$a(year)  
=863 40\$81\$a<1993>-\$xprovisional  
=999 \\\$zILS9271867

**2. Notes: please confirm that vendor is able to provide MVL with the following types of information and customizations to records at no extra cost if requested to do so:**

Ingram's pricing includes customizations, as outlined in the RFP.





ORDER ENTRY	ACCOUNT	PAGE	TAX
D7C9X8HL	2088352	1	

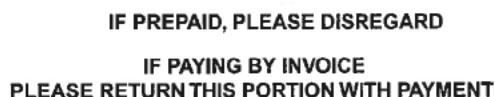
**SOLD TO** 2088352  
MISSION VIEJO LIBRARY  
100 CIVIC CTR  
MISSION VIEJO CA

92691-5518

SHIP TO 20AD641-0000000 017  
MISSION VIEJO LIBRARY  
BMARC - EDI GRID ACCOUNT  
100 CIVIC CTR  
MISSION VIEJO CA 92691-5518

CD 7.60

----- ✂ Cut Along Broken Line ✂ -----



INGRAM LIBRARY SERVICES  
P. O. BOX 502779  
ST. LOUIS, MO 63150-2779  
(800) 937-8200

INVOICE DATE	10/31/2023
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OE #

D7C9X8HL

**ACCOUNT #**

2088352

**INVOICE #**

78614759

**AMOUNT DUE**

90.29



## COLLECTION DEVELOPMENT ODC PROFILE

Return the completed form to [colldvhelp@ingramcontent.com](mailto:colldvhelp@ingramcontent.com).

Form can be completed using the Fill & Sign feature in Adobe Acrobat Reader or by printing the form, completing it, and sending a scanned copy.

\*Required field

Name of Library	*		
Today's Date	*	Reason for Lists	*
Material Delivery Date	*	Requestor Name	*
Requestor Phone #	*	Requestor Email	*
Delivery Address	*		
ipage Account # (if existing customer)		Overall Budget for Project	*\$ OR # of units:
Latest publication date to include in lists	*	Demographics, special interests, and other information that will help us create lists	
Additional notes			

# Adult Print Materials

## Adult Fiction

Budget in \$\$ or Units	*\$ OR # of units:		
Rank formats in desired order (1=most preferred, X=exclude)	<input type="checkbox"/> Hardcover <input type="checkbox"/> Trade Paperback <input type="checkbox"/> Mass Market <input type="checkbox"/> Prebind		
Publication Date Parameters	<input type="checkbox"/> No limitations (will ensure that you receive classics and standards as well as new titles) OR <input type="checkbox"/> Titles no older than (month/year):		
Genre/Collection Labels	Are there any processing requirements that include a genre or collection label? <input type="checkbox"/> No <input type="checkbox"/> Yes If Yes, explain:		
Adult Fiction Genres	<input type="checkbox"/> Keep fiction in one list (recommended) OR <input type="checkbox"/> Separate by genre as outlined in following table:		
Genre/Category	Separate	Exclude	Combine (include which list it should be combined with)
General			
Christian/Religious			
Classics			
Erotica			
Fantasy			
Horror			
Mystery			
Romance			
Science Fiction			
Street Lit/Urban Fiction			
Suspense/Thriller			
Western			
Other:			

## Adult Nonfiction

Budget in \$\$ (including processing costs) or Units	* \$ _____ OR # of units: _____
Rank formats in desired order (1=most preferred, x=exclude)	<input type="checkbox"/> Hardcover <input type="checkbox"/> Trade Paperback <input type="checkbox"/> Mass Market <input type="checkbox"/> Prebind <input type="checkbox"/> Spiral
Pricing Parameters	<input type="checkbox"/> No price parameters OR <input type="checkbox"/> Maximum retail price limit: \$ _____
Publication Date Limits	<input type="checkbox"/> No limitations (will ensure that you receive classics and standards as well as new titles) OR <input type="checkbox"/> Titles no older than (month/year): _____
(Optional) Exceptions by Dewey, LCC, or Subject Category for Adult Nonfiction	

## Adult Reference

Budget in \$\$ (including processing costs) or Units	* \$ _____ OR # of units: _____
Rank formats in desired order (1=most preferred, x=exclude)	<input type="checkbox"/> Hardcover <input type="checkbox"/> Trade Paperback <input type="checkbox"/> Mass Market <input type="checkbox"/> Prebind <input type="checkbox"/> Spiral
Include Multi-Volume Sets?	<input type="checkbox"/> No <input type="checkbox"/> Yes    Maximum Retail Price limit per set (if applicable): \$ _____
Pricing Parameters	<input type="checkbox"/> No price parameters OR <input type="checkbox"/> Maximum retail price limit: \$ _____
Publication Date Limits	<input type="checkbox"/> No limitations (will ensure that you receive classics and standards as well as new titles) OR <input type="checkbox"/> Titles no older than (month/year): _____

## Adult Professional Reference

Budget in \$\$ (including processing costs) or Units	* \$ _____ OR # of units: _____
Include Multi-Volume Sets?	<input type="checkbox"/> Hardcover <input type="checkbox"/> Trade Paperback <input type="checkbox"/> Mass Market <input type="checkbox"/> Prebind <input type="checkbox"/> Spiral



Pricing Parameters	<input type="checkbox"/> No price parameters    OR <input type="checkbox"/> Maximum retail price limit: \$
Publication Date Limits	<input type="checkbox"/> No limitations (will ensure that you receive classics and standards as well as new titles) OR <input type="checkbox"/> Titles no older than (month/year):

## Adult Large Print

Budget in \$\$ (including processing costs) or Units	* \$                      OR    # of units: <input type="checkbox"/> % Fiction <input type="checkbox"/> % Nonfiction    OR    \$                      Fiction    \$                      Nonfiction
Rank formats in desired order (1=most preferred, x=exclude)	<input type="checkbox"/> Hardcover <input type="checkbox"/> Trade Paperback <input type="checkbox"/> Library Binding
Publication Date Parameters	<input type="checkbox"/> No limitations (will ensure that you receive classics and standards as well as new titles) OR <input type="checkbox"/> Titles no older than (month/year):

## Adult Graphic Novels

Budget in \$\$ (including processing costs) or Units	* \$                      OR    # of units:	Age range: _____
Rank formats in desired order (1=most preferred, x=exclude)	<input type="checkbox"/> Hardcover <input type="checkbox"/> Prebind <input type="checkbox"/> Library Binding <input type="checkbox"/> Trade Paperback Include Manga? <input type="checkbox"/> Yes <input type="checkbox"/> No	
For long series with many volumes (e.g., Berserk), which approach would you like us to use for your lists?	<input type="checkbox"/> First few volumes of the series only <input type="checkbox"/> Most recent volumes in the series only <input type="checkbox"/> First few volumes in the series <b>and</b> most recent volumes in the series	
Publication Date Parameters	<input type="checkbox"/> No limitations (will ensure that you receive classics and standards as well as new titles) OR <input type="checkbox"/> Titles no older than (month/year):	
Where should we put Nonfiction Graphic Novels (e.g., <i>Fun Home</i> )?	<input type="checkbox"/> Graphic Novels <input type="checkbox"/> Nonfiction <input type="checkbox"/> Exclude NF GN <input type="checkbox"/> Separate List	<b>Where should we put comic compilations (e.g., Garfield)?</b> <input type="checkbox"/> Graphic Novels <input type="checkbox"/> Nonfiction <input type="checkbox"/> Exclude Comic Compilations <input type="checkbox"/> Separate List
Special Remarks		

## Adult Books in Spanish

Budget in \$\$ (including processing costs) or Units	* \$ _____ OR # of units: _____ _____% Fiction _____% NF _____% GN OR \$ _____Fiction \$ _____NF \$ _____GN <i>Our selections rely on accurate publisher metadata, so we cannot determine original vs. translated.</i>
Rank formats in desired order (1=most preferred, x=exclude)	_____ Hardcover _____ Trade Paperback _____ Mass Market
Publication Date Limits	_____ No limitations (will ensure that you receive classics and standards as well as new titles) OR _____ Titles no older than (month/year): _____

## Adult Audiobooks

Ingram does not offer processing services for AV materials. Any materials selected from these lists will come unprocessed.

## Adult Audiobooks

Budget in \$\$ (including processing costs) or Units	* \$ _____ OR # of units: _____ _____% Fiction _____% Nonfiction OR \$ _____Fiction \$ _____Nonfiction
Publication Date Parameters	_____ No limitations (will ensure that you receive classics and standards as well as new titles) OR _____ Titles no older than (month/year): _____
Rank formats in desired order (1=most preferred, x=exclude)	_____ CD _____ Library Edition CD _____ MP3 CD _____ Library Edition MP3 CD _____ Playaway
Special Remarks	

# Youth Print Materials

## Youth Print Materials

Rank formats in desired order (1=most preferred, x=exclude)	<input type="checkbox"/> Hardcover <input type="checkbox"/> Prebind <input type="checkbox"/> Library Binding <input type="checkbox"/> Trade Paperback <input type="checkbox"/> Mass Market
Publication Date Parameters	<input type="checkbox"/> No limitations (will ensure that you receive classics and standards as well as new titles) OR <input type="checkbox"/> Titles no older than (month/year):
Special Remarks	

## Board Books

Budget in \$\$ (including processing costs) or Units	* \$                      OR # of units: Include (check all that apply): <input type="checkbox"/> Lift the flap <input type="checkbox"/> Touch and feel <input type="checkbox"/> Slides/Pull-tabs <input type="checkbox"/> Shaped
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## Picture Books

Budget in \$\$ (including processing costs) or Units	* \$                      OR # of units:                      Age range: _____
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## Easy Nonfiction (Picture Book format nonfiction)

Budget in \$\$ (including processing costs) or Units	* \$                      OR # of units:                      Age range: _____ How do you want the list delivered? _____ Separately OR _____ Combined with _____
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## Easy Reader (leveled & controlled vocabulary)

Rank formats in desired order (1=most preferred, x=exclude)	<input type="checkbox"/> Hardcover <input type="checkbox"/> Prebind <input type="checkbox"/> Library Binding <input type="checkbox"/> Trade Paperback
Easy Reader Fiction Budget in \$\$ (including processing costs) or Units	* \$                      OR # of units:
Easy Reader Nonfiction Budget in \$\$ (including processing costs) or Units	* \$                      OR # of units: How do you want the list delivered? _____ Separately OR _____ Combined with _____

## Juvenile Fiction

Budget in \$\$ (including processing costs) or Units	* \$	OR # of units:	Age range: _____
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## Juvenile Nonfiction

Budget in \$\$ (including processing costs) or Units	* \$	OR # of units:	Age range: _____
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## Juvenile Graphic Novels

Budget in \$\$ (including processing costs) or Units	* \$	OR # of units:	Age range: _____
Rank formats in desired order (1=most preferred, x=exclude)	<input type="checkbox"/> Hardcover <input type="checkbox"/> Prebind <input type="checkbox"/> Library Binding <input type="checkbox"/> Trade Paperback Include Manga? <input type="checkbox"/> Yes <input type="checkbox"/> No		
For long series with many volumes (e.g., W.I.T.C.H.), which approach would you like us to use for your lists?	<input type="checkbox"/> First few volumes of the series only <input type="checkbox"/> Most recent volumes in the series only <input type="checkbox"/> First few volumes in the series <b>and</b> most recent volumes in the series		
Publication Date Parameters	<input type="checkbox"/> No limitations (will ensure that you receive classics and standards as well as new titles) OR <input type="checkbox"/> Titles no older than (month/year):		
Where should we put Nonfiction Graphic Novels? (e.g., <i>El Deafo</i> )	<input type="checkbox"/> Graphic Novels <input type="checkbox"/> Nonfiction <input type="checkbox"/> Exclude NF GN <input type="checkbox"/> Separate List	Where should we put Comic Compilations (e.g., <i>Big Nate</i> )?	<input type="checkbox"/> Graphic Novels <input type="checkbox"/> Nonfiction <input type="checkbox"/> Exclude Comic Compilations <input type="checkbox"/> Separate List
Special Remarks			

## YA Fiction

Budget in \$\$ (including processing costs) or Units	* \$	OR # of units:	Age range: _____
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## YA Nonfiction

Budget in \$\$ (including processing costs) or Units	* \$	OR # of units:	Age range: _____
What is the primary goal of your YA Nonfiction collection?			
<input type="checkbox"/> Popular reading <input type="checkbox"/> Support the curriculum <input type="checkbox"/> Balance of both			



## YA Graphic Novels

Budget in \$\$ (including processing costs) or Units	* \$	OR # of units:	Age range: _____
Rank formats in desired order (1=most preferred, x=exclude)	<input type="checkbox"/> Hardcover <input type="checkbox"/> Prebind <input type="checkbox"/> Library Binding <input type="checkbox"/> Trade Paperback Include Manga? <input type="checkbox"/> Yes <input type="checkbox"/> No		
For long series with many volumes (e.g., One Piece), which approach would you like us to use for your lists?	<input type="checkbox"/> First few volumes of the series only <input type="checkbox"/> Most recent volumes in the series only <input type="checkbox"/> First few volumes in the series <b>and</b> most recent volumes in the series		
Publication Date Parameters	<input type="checkbox"/> No limitations (will ensure that you receive classics and standards as well as new titles) OR <input type="checkbox"/> Titles no older than (month/year):		
Where should we put Nonfiction Graphic Novels (e.g., March)?	<input type="checkbox"/> Graphic Novels <input type="checkbox"/> Nonfiction <input type="checkbox"/> Exclude NF GN <input type="checkbox"/> Separate List	Where should we put Comic Compilations (e.g., Simpsons)?	<input type="checkbox"/> Graphic Novels <input type="checkbox"/> Nonfiction <input type="checkbox"/> Exclude Comic Compilations <input type="checkbox"/> Separate List
Criteria for inclusion	Our Graphic Novel librarian designates YA Graphic Novels according to three sets of criteria. Please select all that you wish to include:  <input type="checkbox"/> Include titles most appropriate for younger YA readers with safe themes, fantasy violence only, and little or no swearing.  <input type="checkbox"/> Include titles recommended for teens of any age—may contain some mild profanity, mild violence and gore, suggestive situations, nonsexual and nondescript nudity, skimpy clothing, or references to alcohol, tobacco, or illegal drug use.  <input type="checkbox"/> Include titles reviewed for mature teens—may contain profanity and strong language, moderate levels of violence, gore, provocative clothing, semi-nudity, some sexual themes but no explicit sex, alcohol, or illegal drug use.		
Special Remarks			

## Youth Reference

Budget in \$\$ (including processing costs) or Units	* \$ _____ OR # of units: _____ Age range: _____
Include Multi-Volume Sets?	____ No ____ Yes Maximum retail price per set, if applicable: \$ _____
Pricing Parameters	____ No price parameters OR ____ Maximum retail price limit: \$ _____
Publication Date Limits	____ No limitations (will ensure that you receive classics and standards as well as new titles) OR ____ Titles no older than (month/year): _____

## Youth Professional Reference

Budget in \$\$ (including processing costs) or Units	* \$ _____ OR # of units: _____ Age range being served by the professionals: _____
Include Multi-Volume Sets?	____ No ____ Yes Maximum retail price per set, if applicable: \$ _____
Pricing Parameters	____ No price parameters OR ____ Maximum retail price limit: \$ _____
Publication Date Limits	____ No limitations (will ensure that you receive classics and standards as well as new titles) OR ____ Titles no older than (month/year): _____

## Youth Books in Spanish

Budget in \$\$ (including processing costs) or Units	* \$ _____ OR # of units: _____
Monolingual vs. Bilingual	____ Include both monolingual and bilingual editions of the same title when available OR ____ Rank translations in this order: ____ Monolingual ____ Bilingual <i>Our selections rely on accurate publisher metadata, so we cannot determine original vs. translated.</i>
Types of Books to Include	Board Books \$____ Picture Books \$____ Easy NF \$____ Easy Reader Fic \$____ Easy Reader NF \$____ Juvenile Fic \$____ Juvenile GN \$____ Juvenile NF \$____ YA Fic \$____ YA GN \$____ YA NF \$____
Special Remarks	

# Youth Audiobooks

Ingram does not offer processing services for AV materials. Any materials selected from these lists will come unprocessed.

Publication Date Limits	<input type="checkbox"/> No limitations (will ensure that you receive classics and standards as well as new titles) OR <input type="checkbox"/> Titles no older than (month/year): _____
	<input type="checkbox"/> CD <input type="checkbox"/> Library Edition CD <input type="checkbox"/> CD/Book Combo <input type="checkbox"/> MP3 CD <input type="checkbox"/> Library Edition MP3 CD <input type="checkbox"/> Playaway If a title is only available as abridged, do you want it? <input type="checkbox"/> Yes <input type="checkbox"/> No

## Audiobook Readalongs

Budget in \$\$ (including processing costs) or Units	* \$ _____	OR # of units: _____	Age range: _____
	_____ % Fiction	_____ % Nonfiction	OR \$ _____ Fiction    \$ _____ Nonfiction

## Juvenile Audiobooks

Budget in \$\$ (including processing costs) or Units	* \$ _____	OR # of units: _____	Age range: _____
	_____ % Fiction	_____ % Nonfiction	OR \$ _____ Fiction    \$ _____ Nonfiction

## YA Audiobooks

Budget in \$\$ (including processing costs) or Units	* \$ _____	OR # of units: _____	Age range: _____
	_____ % Fiction	_____ % Nonfiction	OR \$ _____ Fiction    \$ _____ Nonfiction

When completed, please email form to [coldevhelp@ingramcontent.com](mailto:coldevhelp@ingramcontent.com).



## City of Mission Viejo

200 Civic Center  
Mission Viejo, CA 92691  
Phone (949) 470-3059  
[purchasing@cityofmissionviejo.org](mailto:purchasing@cityofmissionviejo.org)

### Vendor Approval Application

Please type or print in black ink. All vendor information must be complete and application must be signed. A signed Form W-9 must accompany this application.

Name of City Employee requesting this information:

#### Business Information:

*Company Name	Ingram Library Services LLC		
*Address	One Ingram Blvd.	*Suite	n/a
*City	La Vergne	*State	Tennessee
		*Zip	37086
*Contact Name/Title	Kate Collingwood, Contract Management Specialist	Email	ilsbids@ingramcontent.com
*Phone ( 615 )	213-5736	*Website	<a href="http://www.ingramcontent.com/pages/libraries.aspx">http://www.ingramcontent.com/pages/libraries.aspx</a>
Accts Receivable Contact Name	Ingram Library Services LLC	E-Mail	ilsbids@ingramcontent.com
*Remit Address	P. O. BOX 502779, St. Louis	*State	MO
		*Zip	63150-2779
Accts Receivable Phone	(800) 937-8200		
Where is your DBA registered?	n/a		
Year Established	1986	Incorporated: Year	n/a
		State	Tennessee
Product or Services provided	Wholesale distributor of Library materials (Books and Audio-visual); Collection Development, cataloging, and processing services		

#### Standard Terms:

Net 30 ☒ 2% 10 Net 30 ☐ Other

#### Current California License or Certification(s) (Examples: Contractor, Instructor, Health Dept, Architectural, Sports/Fitness, etc.):

Type		Number	
Type		Number	
Type		Number	
DIR Registration (if applicable)		Number	

#### Company Ownership:

Sole Proprietorship ☐ Partnership ☐ Corporation ☐ Other ☒ (please indicate) LLC

\*Information is subject to disclosure under the Public Record Act



**Principal Ownership or Corporate Officers:**

Name	Shawn Morin	Title	President & CEO
Name	Phil Ollila	Title	Chief Commercial & Content Officer
Name	Carolyn Morris	Title	Vice President

**References:**

Please list three companies with whom you are currently doing business

Company Name	Mohave County Library District	Phone (	928	)	692-5744
Address	13136 S Golden Shores Pkwy.	Suite			
City	Topock	State	AZ	Zip	86436
Company Name	Albuquerque/Bernalillo County Library System	Phone (	505	)	768-5153
Address	501 Copper Ave NW	Suite			
City	Albuquerque	State	NM	Zip	87102
Company Name	Jefferson Parish Library	Phone (	504	)	609-2972, ext. 2841
Address	4747 West Napoleon Avenue	Suite			
City	Metairie	State	LA	Zip	70001-2310

Do you have a relationship with any existing City of Mission Viejo employee, Commissioner, Council member or Board member? YES ☐ NO ☒ If yes, please describe relationship below:


**Certification:**

Under penalty of perjury, I certify that all information provided on this application is true and correct.

Signature of Company Officer	<i>Carolyn Morris</i>	Title	Vice President
Please Print Name	Carolyn Morris	Date	April 26, 2024

## CITY OF MISSION VIEJO

### AGREEMENT WITH INGRAM LIBRARY SERVICES, LLC FOR CUSTOMIZED LIBRARY SERVICES OVER \$50,000

*(Insurance Required)*

**THIS AGREEMENT** is made and effective as of July 1, 2024, between the **City of Mission Viejo**, a California general law city and municipal corporation ("City") and **Ingram Library Services, LLC** ("Consultant"). In consideration of the mutual covenants and conditions set forth herein, the parties agree as follows:

1. **TERM.** This Agreement shall commence on July 1, 2024, and shall remain and continue in effect until tasks described herein are completed, but in no event later than June 30, 2026, unless sooner terminated pursuant to the provisions of this Agreement. Notwithstanding this limit on term, some duties and obligations may survive the termination, lapse, or completion of this Agreement. This contract may be renewed by mutual agreement of both parties for one (1) two-year term. This renewal is contingent upon satisfactory work being performed by the Consultant.

2. **SERVICES.** Consultant shall perform the tasks described and set forth in **Exhibit A**, attached hereto and incorporated herein as though set forth in full. Consultant shall complete the tasks according to the schedule of performance which is also set forth in **Exhibit A**.

3. **PERFORMANCE.** Consultant shall at all times faithfully, competently, and to the best of their ability, experience, and talent, perform all tasks described herein. Consultant represents to the City that it has the qualifications and equipment/technology necessary to competently and reasonably perform the tasks required by this Agreement. Consultant shall employ, at a minimum, generally accepted standards, practices, and equipment utilized by persons engaged in providing similar services as are required of Consultant hereunder in meeting its obligations under this Agreement.

4. **PAYMENT.**

a. The City agrees to pay Consultant monthly in arrears, in accordance with the payment rates and terms and the schedule of payment as set forth in **Exhibit B**, attached hereto and incorporated herein by this reference as though set forth in full, based upon actual time spent on the above tasks. This amount shall not exceed **Four Hundred Thousand Dollars (\$400,000.00)** for the total term of the Agreement unless additional payment is approved as provided in this Agreement. Any terms or conditions set forth in **Exhibit A or Exhibit B**, which do not describe the work to be performed, the payment rates and terms, or the payment schedule have not been agreed to by the City and shall not be deemed a part of this Agreement.

b. Consultant shall not be compensated for any services rendered in connection with its performance of this Agreement which are in addition to those set forth herein, unless such additional services are authorized in advance and in writing by the City Council or, if pursuant to its authority, the City Manager, or their designee. Consultant shall be compensated for any additional services in the amounts and in the manner as agreed to by City Manager or the City's representative and Consultant at the time City's written authorization is given to Consultant for the performance of said services. The City Manager may approve additional work not to exceed \$50,000. Any additional work in excess of this amount shall be approved by the City Council.

c. Consultant shall submit reasonably detailed invoices monthly for actual services performed and, as applicable, equipment and materials acquired. Invoices shall be submitted on or about the first business day of each month, for services provided in the previous month. Payment shall be made within thirty (30) days of receipt of each invoice as to all non-disputed fees. If the City disputes any of Consultant's fees it shall give written notice to Consultant within 30 days of receipt of an invoice of any disputed fees set forth on the invoice.

d. Notwithstanding the above provisions, Consultant shall not be paid for any work performed until it has submitted to the City a fully completed and executed Internal Revenue Service Form W-9.

## **5. SUSPENSION OR TERMINATION OF AGREEMENT WITHOUT CAUSE.**

a. The City may at any time, with or without cause, in its sole discretion, suspend or terminate this Agreement, or any portion hereof, by serving upon the Consultant at least thirty (30) days prior written notice of the decision. City shall not be obligated to explain its reasons for termination. Upon receipt of said notice, the Consultant shall promptly cease all work under this Agreement, unless the notice provides otherwise. If the City suspends or terminates a portion of this Agreement, such suspension or termination shall not make void or invalidate the remainder of this Agreement.

b. In the event this Agreement is suspended or terminated pursuant to this Section, the City shall pay to Consultant the actual value of the work performed up to the time of suspension or termination, provided that the work performed is of value to the City and consistent with the Agreement. Upon suspension or termination of the Agreement pursuant to this Section, the Consultant will, as a precondition to being compensated, submit an invoice to the City consistent with Section 4.

## **6. DEFAULT OF CONSULTANT.**

a. The Consultant's failure to comply with the provisions of this Agreement shall constitute a material default. In the event that Consultant is in default for cause under the terms of this Agreement, City shall have no obligation or duty to continue compensating Consultant for any work performed after the date of default. In the event of default, Consultant shall have a reasonable opportunity to cure, no less than thirty (30) days. After the opportunity to cure, City may terminate this Agreement by written notice to the Consultant. If such failure by the Consultant to make progress in the performance of work hereunder arises out of causes beyond the Consultant's control, and without fault or negligence of the Consultant, it shall not be considered a default.

b. If the City Manager or their delegate determines that the Consultant is in default in the performance of any of the terms or conditions of this Agreement, it shall serve the Consultant with written notice of the default. The Consultant shall have thirty (30) calendar days after service upon it of said notice in which to cure the default by rendering a satisfactory performance. In the event that the Consultant fails to cure its default within such period of time, the City shall have the right, notwithstanding any other provision of this Agreement, to terminate this Agreement without further notice and without prejudice to any other remedy to which it may be entitled at law, in equity, or under this Agreement.

## **7. OWNERSHIP OF DOCUMENTS.**

a. Consultant shall maintain, during the term of this Agreement and for at least two (2) years thereafter, records sufficient to demonstrate Consultant's compliance with its obligations under this Agreement. Upon reasonable advance notice, the City may request,

once per calendar year, that Consultant engage Ingram Industries Inc.'s ("Ingram") Internal Audit department to perform specified procedures as determined by the City. Such procedures will be performed in accordance with attestation standards established by the American Institute of Certified Public Accountants ("Agreed Upon Procedures") and will be related to Consultant's compliance with its obligations under this Agreement for the twelve (12) months prior to the date of the request and provide a written report to the City. In the event that the City is not satisfied with such procedures for any reason, the City may, at its election and cost, engage PriceWaterhouseCoopers, LLP, Ingram's current independent public accounting firm, (or if such firm is no longer available, an independent public accounting firm reasonably acceptable to both parties) to conduct Agreed Upon Procedures related to Consultant's obligations under this Agreement in connection with such inspection. If in the written opinion of such auditors there has been an underpayment by Consultant or an overpayment by the City of more than five percent (5%) of the total amounts due during the previous twelve month period, Consultant shall pay the reasonable costs of such audit in addition to promptly paying such amounts. (For clarity, any discrepancy between amounts paid to or from either party and amounts shown to be due by such audit shall be promptly payable, whether or not equal to five percent (5%) of total amounts during the previous twelve-month period.)

b. Upon completion of, or in the event of termination or suspension of this Agreement, all original documents, designs, drawings, maps, models, computer files, surveys, notes, video and sound recordings, and other documents prepared in the course of providing the services to be performed pursuant to this Agreement shall become the sole property of the City and may be used, reused or otherwise disposed of by the City without the permission of the Consultant. With respect to computer files, Consultant shall make available to the City, upon reasonable written request by the City, the necessary computer software and hardware for purposes of accessing, compiling, transferring, and printing computer files.

c. Notwithstanding anything to the contrary, Consultant, including all persons, firms, or entities with which it may interact, shall provide City all records pursuant to the California Public Records Act at City's request. This duty and obligation shall survive the lapse, termination, or completion of this Agreement. No cost shall be charged to the City related to compliance with this provision.

**8. INDEMNIFICATION.** The Consultant agrees to defend, indemnify, protect and hold harmless the City, its officers, officials, consultants, employees, attorneys, agents, and volunteers from and against any and all claims, demands, losses, defense costs or expenses, or liability of any kind or nature which the City, its officers, officials, consultants, employees, attorneys, agents, and volunteers may sustain or incur or which may be imposed upon them for injury to or death of persons, or damage to property arising out of Consultant's negligent or wrongful acts or omissions in performing or failing to perform under the terms of this Agreement, excepting only liability arising out of the negligence of the City. This section shall, without limitation, survive the termination, lapse, or completion of this Agreement.

**9. INSURANCE REQUIREMENTS.** Consultant shall procure and maintain for the duration of the contract insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the work hereunder by the Consultant, its agents, representatives, or employees.

Consultant agrees to provide insurance in accordance with the requirements set forth in **Exhibit C**. If Consultant uses existing coverage to comply with these requirements and that coverage does



not meet the requirements set forth herein, Consultant agrees to amend, supplement, or endorse the existing coverage to do so. This duty or obligation shall survive the lapse, termination, or completion of this Agreement.

#### **10. INDEPENDENT CONTRACTOR.**

a. Consultant is and shall at all times remain as to the City a wholly independent contractor having only the contractual duties and obligations agreed upon as memorialized in this Agreement. The personnel performing the services under this Agreement on behalf of Consultant shall at all times be under Consultant's exclusive direction and control. Neither City nor any of its officers, officials, employees, agents, or volunteers shall have control over the conduct of Consultant or any of Consultant's officers, employees, or agents, except as set forth in this Agreement. Consultant shall not at any time or in any manner represent that it or any of its officers, employees, or agents are in any manner officers, employees, or agents of the City. Consultant shall not incur or have the power to incur any debt, obligation, or liability whatsoever against or for City, or bind City in any manner, whether in law or equity.

b. No employee benefits shall be available to Consultant in connection with the performance of this Agreement. Except for the fees paid to Consultant as provided in the Agreement, City shall not pay, nor be deemed to have paid or delivered salaries, wages, or other compensation to Consultant for performing services hereunder for City. City shall not be liable for compensation or indemnification to Consultant for injury or sickness arising out of performing services hereunder.

**11. LEGAL RESPONSIBILITIES.** The Consultant shall keep itself informed of all applicable State and Federal laws and regulations, which in any manner affect its requirements under this Agreement, and those employed by it or in any way affect the performance of its service, duties, and obligations pursuant to this Agreement. The Consultant shall at all times observe and comply with all such applicable laws and regulations. The City, its officers, officials, employees, attorneys, agents, and volunteers shall not be liable at law or in equity occasioned by failure of the Consultant to comply with this section. This section shall survive, without limitation, the termination, lapse or completion of this Agreement.

#### **12. RELEASE OF INFORMATION.**

a. All information gained by Consultant in performance of this Agreement shall be considered confidential and shall not be released by Consultant without City's prior written authorization. Consultant, its officers, employees, agents, or subcontractors shall not, without written authorization from the City or unless requested by the City Attorney, voluntarily provide declarations, letters of support, testimony at depositions, response to interrogatories or other information concerning the work performed under this Agreement or relating to any project or property located within the City. Response to a subpoena or court order shall not be considered "voluntary" provided Consultant gives City prior notice of such court order or subpoena.

b. Consultant shall promptly notify City should Consultant, its officers, employees, agents, or subcontractors be served with any summons, complaint, subpoena, notice of deposition, request for documents, interrogatories, request for admissions or other discovery request, court order, or subpoena from any person regarding this Agreement and the work performed thereunder or with respect to any project or property located within the City. City retains the right, but has no obligation, to represent Consultant and/or be present at any deposition, hearing or similar proceeding. Consultant agrees to cooperate fully with City and to provide City with the opportunity to review any response to discovery requests provided by Consultant. However, City's right to

review any such response does not imply the right of or require City to control, direct, or rewrite said response.

**13. NOTICES.** Any notices which either party may desire to give to the other party under this Agreement must be in writing and may be given either by (i) personal service, (ii) delivery by a reputable document delivery service, such as but not limited to, Federal Express, that provides a receipt showing date and time of delivery, or (iii) mailing in the United States Mail, certified mail, postage prepaid, return receipt requested, addressed to the address of the Party as set forth below or at any other address as that Party may later designate by subsequent written notice:

To City: City of Mission Viejo  
200 Civic Center  
Mission Viejo, CA 92691  
Attention: City Manager

To Consultant: Ingram Library Services, LLC  
One Ingram Blvd.  
La Vergne, TN 37086

**14. ASSIGNMENT.** The parties shall not assign the performance of this Agreement, nor any part thereof, nor any monies due hereunder, without prior written consent of the other party, which the other party may grant or withhold in its sole and absolute discretion, with no obligation to disclose the basis for its decision to any person, firm, entity, or Party. Upon termination of this Agreement, Consultant's sole compensation shall be payment for actual services performed up to, and including, the date of termination or as may be otherwise agreed to in writing between the City and the Consultant.

**15. LICENSES.** At all times during the term of this Agreement and prior to commencement of any work under this Agreement, Consultant shall have in full force and effect, all licenses required of it by law for the performance of the services described in this Agreement.

**16. GOVERNING LAW.** The City and Consultant agree that the laws of the State of California, or, as necessary, the laws of the United States Federal government, shall govern the rights, obligations, duties, and liabilities of the parties to this Agreement and shall govern the interpretation of this Agreement.

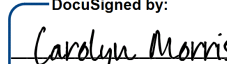
**17. LITIGATION.** Any litigation concerning this Agreement commenced by a Party or any person, firm or entity claiming under Consultant shall be filed and have venue in the municipal, superior, or federal district court with geographic jurisdiction over the City of Mission Viejo.

**18. ENTIRE AGREEMENT.** This Agreement contains the entire understanding between the parties relating to the obligations of the parties described in this Agreement. All prior or contemporaneous agreements, understandings, representations and statements, oral or written, direct or implied, are merged into this Agreement and shall be of no further force or effect. Each Party is entering into this Agreement based solely upon the representations set forth herein and upon each party's own independent investigation of any and all facts such party deems material. Each Party has had the opportunity to have this Agreement reviewed by independent legal counsel of its own selection and is not relying on any representations, opinions, or advice of the other Party.

**19. AUTHORITY TO EXECUTE THIS AGREEMENT.** The person or persons executing this Agreement on behalf of Consultant warrant and represent that they have the authority to execute this Agreement on behalf of the Consultant and have the authority to bind Consultant to the performance of its obligations hereunder. Consultant agrees that the person executing this Agreement is an authorized agent of Consultant with the power to bind Consultant to this Agreement.

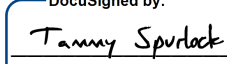
**IN WITNESS WHEREOF**, the parties hereto have caused this Agreement to be executed the day and year first above written.

**INGRAM LIBRARY SERVICES LLC**

DocuSigned by:  
  
 B4A2A4B510B0453...  
 Carolyn Morris  
 Vice President

6/28/2024

Date

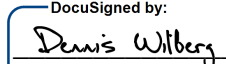
DocuSigned by:  
  
 4B3F27CD4A45471...  
 Tammy Spurlock  
 Director of Library Operations

6/30/2024

Date

[Two signatures of corporate officers required]

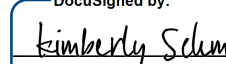
**CITY OF MISSION VIEJO**

DocuSigned by:  
  
 1B6784A41D00473...  
 Dennis Wilberg  
 City Manager

6/30/2024

Date

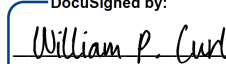
Attest:

DocuSigned by:  
  
 5CC13C4BCBB847F...  
 Kimberly Schmitt  
 City Clerk

6/30/2024

Date

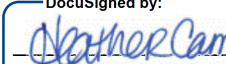
Approved As to Form:

DocuSigned by:  
  
 6524C7963D4547A...  
 William P. Curley, III  
 City Attorney

6/30/2024

Date

Insurance Review:

DocuSigned by:  
  
 3B8584844F63401...  
 Heather Campbell  
 Risk Management Administrator

7/2/2024

Date

## **EXHIBIT A**

### **TASKS TO BE PERFORMED**

Automated collection development and acquisitions, cataloging, and processing of books and other library materials. These services shall include electronic ordering and EDI invoicing capabilities, providing cataloging records, and providing shelf-ready processed and delivered library materials.



## **EXHIBIT B**

### **PAYMENT SCHEDULE**

Invoices will be paid only after receipt of materials. Invoices must be received on or about the first business day of each month for payment within 30 days of receipt of each invoice. Ingram Library Services, LLP must also provide the option to deposit funds into a credit account or an impound account.

## EXHIBIT C

### INSURANCE REQUIREMENTS

The following coverages will be provided by Consultant and maintained on behalf of the City and in accordance with the requirements set forth herein. Consultant agrees to submit insurance coverages described herein before any work is performed pursuant to this Agreement.

**General Liability Insurance.** Consultant shall maintain a policy of general liability insurance against any and all claims arising out of or in connection with the work performed under this Agreement. Coverage provided shall be at least as broad as ISO form CG 00 01 in an amount not less than one million dollars (**\$1,000,000.00**) per occurrence, two million dollars (**\$2,000,000.00**) general aggregate, for bodily injury, personal injury, and property damage. The policy must include contractual liability that has not been amended. Any endorsement restricting standard ISO “insured contract” language will not be accepted. This policy shall name City, its officers, officials, employees, agents, and volunteers as additional insureds. Coverage shall not be limited to the vicarious liability or supervisory role of any additional insured.

**Automobile Liability Insurance.** Consultant shall maintain automobile insurance at least as broad as Insurance Services Office form CA 00 01 covering bodily injury and property damage for all activities of the Consultant arising out of or in connection with Work to be performed under this Agreement, including coverage for “Any Auto, Symbol 1” or its equivalent “any owned, hired, non-owned, or rented vehicles”, in an amount not less than one million dollars (**\$1,000,000.00**) combined single limit for each accident. If the Consultant does not own any company vehicles, the requirement may be satisfied by providing a Personal Automobile Liability policy for the Consultant’s vehicle. The Consultant may use an umbrella policy or a non-owned auto endorsement to the Commercial General Liability policy to meet the limits if the Consultant’s auto insurance does not offer the \$1,000,000 combined single limit. This coverage is only required when the Consultant drives on behalf of the City to perform the activities arising out of or in connection with Work to be performed in this agreement.

**Workers' Compensation/Employer's Liability.** Consultant shall maintain workers’ compensation insurance with statutory limits and employer’s liability insurance in an amount not less than one million dollars (**\$1,000,000.00**) per accident for bodily injury or disease for Consultant’s employees in accordance with the laws of the State of California, Section 3700 of the Labor Code. Consultant shall furnish to City a waiver of subrogation endorsement in favor of City, its officers, agents, employees, and volunteers. If Consultant is a sole ownership/ proprietorship and does not have any employees, Consultant shall certify such facts to the City by completing a “Declaration of Non-Employer Status” declaring such and worker’s compensation coverage shall not be required.

**Professional Liability Insurance/Errors and Omissions.** Consultant shall maintain professional liability insurance that covers the Services to be performed in connection with this Agreement, in the minimum amount of one million dollars (**\$1,000,000**) per claim and in the aggregate. If coverage is provided under a claims-made policy, any policy inception date, continuity date, or retroactive date must be before the effective date of the agreement and Consultant agrees to maintain continuous coverage through a period no less than three years after completion of the services required by this Agreement.

**Cyber security and privacy liability.** Consultant shall procure and maintain insurance with limits of **\$1,000,000** per occurrence/loss, **\$2,000,000** general aggregate, which shall include the following coverage:

- a. Liability arising from the theft, dissemination and/or use of confidential or personally identifiable information; including but not limited to personally identifiable information (PII), protected health information (PHI), security codes, access codes, passwords, etc.
- b. Network security liability arising from the unauthorized use of, access to, or tampering with computer systems, including hacker or denial of service attacks.
- c. Liability arising from introducing a computer virus into or otherwise causing damage to vendor (first-party) or customer's (third party) computer, computer system, network, or similarly related property and the data, software, and programs.
- d. Liability arising from professional misconduct or lack of the requisite skill required for performing services defined in the contract or agreement.
- e. Costs associated with restoring, updating, or replacing data.
- f. Costs associated with a privacy breach, including notification costs, customer support, forensics, crises management, public relations consulting, legal services of a privacy attorney, credit monitoring, and identity fraud resolution services for affected individuals.

If coverage is maintained on a claims-made basis, consultant shall maintain such coverage for an additional three (3) years following termination of the contract.

**Umbrella or excess liability insurance.** [If required to meet higher limits]. Consultant shall maintain an umbrella liability insurance policy with limits that will provide bodily injury, personal injury, and property damage liability coverage, including commercial general liability, automobile liability, professional liability, and employer's liability. Such policy or policies shall include the following terms and conditions:

- A drop-down feature requiring the policy to respond if any primary insurance that would otherwise have applied proves to be uncollectible in whole or in part for any reason, other than bankruptcy or insolvency of said primary insurer;
- "Pay on behalf of" wording as opposed to "reimbursement";
- Concurrency of effective dates with primary policies.

Should Consultant maintain an excess liability policy, such policy shall be excess over commercial general liability, automobile liability, professional liability, and employer's liability policies. Such policy or policies shall include wording that the excess liability policy follows the terms and conditions of the underlying policies.

**Consultant and City further agree as follows:**

1. This Exhibit supersedes all other sections and provisions of this Agreement to the extent that any other section or provision conflicts with or impairs the provisions of this Exhibit.
2. Nothing contained in this Exhibit is to be construed as affecting or altering the legal status of the parties to this Agreement. The insurance requirements set forth in this Exhibit are

intended to be separate and distinct from any other provision in this Agreement and shall be interpreted as such.

3. All insurance coverage and limits provided pursuant to this agreement shall apply to the full extent of the policies involved, available, or applicable. Nothing contained in this Agreement or any other agreement relating to the City or its operations limits the application of such insurance coverage.
4. Requirements of specific coverage features or limits contained herein are not intended as a limitation on coverage, limits on other requirements, or a waiver of any coverage normally provided by any insurance. Specific reference to a given coverage feature is for purposes of clarification only as it pertains to a given issue and is not intended by any party or insured to be all inclusive, or to the exclusion of other coverage, or a waiver or limitation of any type. If the Consultant maintains higher limits than the minimums shown above, the City requires and shall be entitled to coverage for the higher limits maintained by the Consultant. Any available insurance proceeds in excess of the specified minimum limits of insurance and coverage shall be available to the City.
5. For purposes of insurance coverage only, this Agreement will be deemed enforceable immediately upon any party hereto taking any steps that can be deemed to be in furtherance of or towards the performance of this Agreement.
- 6.
7. Unless otherwise approved by City, Consultant's insurance shall be written by insurers authorized to do business in the State of California and which hold a minimum "Best's" Insurance Guide rating of "A:VII."
8. In the event any policy of insurance required under this Agreement does not comply with these requirements or is canceled and not replaced, City has the right but not the duty to obtain the insurance it deems necessary and any premium paid by City will be promptly reimbursed by Consultant or City will withhold amounts sufficient to pay premium from Consultant payments. In the alternative, City may cancel this Agreement.
9. Consultant shall provide certificates of insurance and required endorsements to City as evidence of the insurance coverage required herein. The insurance certificate and endorsements are to be signed by a person authorized by that insurer to bind coverage on its behalf. City reserves the right to require complete, certified copies of all required insurance policies, at any time. Insurance certificates and endorsements must be approved by City's Risk Management prior to commencement of performance. Current certification of insurance shall be kept on file with City for the contract period and any additional length of time required thereafter.
10. Consultant shall provide proof that policies of insurance required herein expiring during the term of this Agreement have been renewed or replaced with other policies providing at least the same coverage. Such proof will be furnished prior to the expiration of the coverages; failure to do so shall be deemed a material breach of this Agreement and may subject this Agreement to termination or the City unilaterally replacing the policy(s) at Consultant's sole expense, without prior notice.

11. Any self-insured retentions must be declared to and approved by City. City reserves the right to require proof of ability to pay losses and related investigations, claim administration, and defense expenses within the retention.
12. Consultant acknowledges and agrees that any actual or alleged failure on the part of City or any other additional insured under these requirements to obtain proof of insurance required under this Agreement or to inform Consultant of noncompliance with any requirement in no way waives any right or remedy of City or any additional insured, in this or any other regard.
13. Consultant agrees to require all subcontractors/subconsultants or other parties hired for this project to provide proof of insurance coverage as outlined above before work is performed by said subcontractors/subconsultants or other parties pursuant to the Agreement. Consultant agrees to obtain certificates evidencing such coverage and to ensure that such coverage is provided as required herein. Consultant agrees to monitor and review all such coverage and assumes all responsibility for ensuring that such coverage is provided in conformity with the requirements of this section. However, in the event Consultant's subconsultant/subcontractor cannot comply with this requirement, which proof must be submitted to the City, Consultant shall be required to ensure that its subcontractor/subconsultant provide and maintain insurance coverage and endorsements sufficient to the specific risk of exposure involved with subcontractors/subconsultants scope of work and services, with limits less than required of the Consultant, but in all other terms consistent with the Consultant's requirements under this agreement. This provision does not relieve the Consultant of its contractual obligations under the agreement and/or limit its liability to the amount of insurance coverage provided by its subcontractors/subconsultant. This provision is intended solely to provide Consultant with the ability to utilize a subconsultant/subcontractor who may be otherwise qualified to perform the work or services but may not carry the same insurance limits as required of the Consultant under this agreement given the limited scope of work or services provided by the subconsultant/ subcontractor. Consultant agrees to require that no contract used by any subcontractors/ subconsultant or contracts Consultant enters into on behalf of City, will reserve the right to charge back to City the cost of insurance required by this agreement. Consultant agrees that upon request all agreements with subcontractors/subconsultants or others with whom Consultant contracts with on behalf of City will be submitted to City for review for competency with this Agreement. Failure of City to request copies of such agreement will not impose any liability on City, or its employees, officers, officials, agents, and volunteers, nor does it waive or limit City's right to subsequently ask for the copies.
14. If Consultant is a Limited Liability Company, general liability coverage must be amended, to City's reasonable satisfaction, so that the Limited Liability Company and its Managers, Affiliates, employees, agents, and other persons necessary or incidental to its operation are insureds.
15. Consultant shall give City prompt and timely notice of claims made or suits instituted that arise out of or result from Consultant's performance under this Agreement, and that involve or may involve coverage under any of the required liability policies. Consultant agrees to provide immediate notice to City of any claim or loss against Consultant that includes City as a defendant. City assumes no obligation or liability by such notice, but has the right (but not the duty) to monitor or recommend the handling of any such claim or claims if they are likely to involve City. Any failure to comply with reporting or other provisions of the policies including breaches of warranties shall not affect coverage provided to the City, its officers,



officials, employees, agents, or volunteers.

16. The insurance provided pursuant to these requirements will not be limited to coverage for the vicarious liability or supervisory role of any additional insured. All insurance coverage and limits provided are intended to apply to the full extent of the policies. Nothing contained in this agreement limits the application of such insurance coverage.
17. Primary/noncontributing. Coverage provided by Consultant shall be primary and any insurance or self-insurance procured or maintained by City shall not be required to contribute with it. The limits of insurance required herein may be satisfied by a combination of primary and umbrella or excess insurance. Any umbrella or excess insurance shall contain or be endorsed to contain a provision that such coverage shall also apply on a primary and non-contributory basis for the benefit of City before City's own insurance or self-insurance shall be called upon to protect it as a named insured. For any claims related to this project, the Consultant's insurance coverage shall be primary insurance as respects to the City, its officers, officials, employees, agents, or volunteers. Any insurance or self-insurance maintained by the City, its officers, officials, employees, agents, or volunteers shall be in excess of the Consultant's insurance and shall not contribute with it.
18. Duration of coverage. Consultant shall procure and maintain for the contract period, and any additional length of time required thereafter, insurance against claims for injuries to persons or damages to property, or financial loss which may arise from or in connection with the performance of the Work hereunder by Consultant, their agents, representatives, employees, or subcontractors/subconsultants.
19. Waiver of Subrogation. All insurance coverage maintained or procured pursuant to this Agreement shall be endorsed to waive subrogation against City, its elected or appointed officers, agents, officials, employees, and volunteers or shall specifically allow Consultant or others providing insurance evidence in compliance with these specifications to waive their right of recovery prior to a loss. Consultant hereby waives its own right of recovery against City and shall require similar written express waivers and insurance clauses from each of its subcontractors/ subconsultants.
20. Additional Insured Status. General liability, automobile liability, and umbrella/excess liability insurance policies shall provide or be endorsed to provide that City and its officers, officials, employees, agents, and volunteers shall be additional insureds under such policies.
21. Separation of Insureds. A severability of interests provision must apply for all additional insureds ensuring that Consultant's insurance shall apply separately to each insured against whom claim is made or suit is brought, except with respect to the insurer's limits of liability. The policy(ies) shall not contain any cross-liability exclusions.
22. Notice of cancellation. Consultant agrees to oblige its insurance agent or broker and insurers to provide the City with a thirty (30) day notice of cancellation (except for nonpayment for which a ten (10) day notice is required) or nonrenewal of coverage for each required coverage. If any of the Consultant's insurers are unwilling to provide such notice, then Consultant shall be responsible for notifying the City immediately in the event of Consultant's failure to renew any of the required insurance coverages or insurer's cancellation or non-renewal.

23. The City reserves the right at any time during the term of the contract to change the amounts and types of insurance required by giving the Consultant ninety (90) days advance written notice of such change. If such change results in substantial additional cost to the Consultant, the City and Consultant may renegotiate Consultant's compensation.
24. Prohibition of undisclosed coverage limitations. None of the coverages required herein will be in compliance with these requirements if they include any limiting endorsement of any kind that has not been first submitted to City and approved of in writing.
25. Additional insurance. Consultant shall also procure and maintain, at its own cost and expense, any additional kinds of insurance, which in its own judgment may be necessary for its proper protection and prosecution of the Work.