



## EOI for supply of purchased books (Australian) 2017 Expression of Interest Application Form

Note: All responses must be submitted using the [online form](#).

Please complete each section of this form and include as much information as you can. The selection criteria are set out in the [specifications for purchased books \(Australian\)](#).

The deadline for responses is 12pm on Friday 29 September 2017 (AEST).

Contact Officer:

Zoe Melling

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State Library of New South Wales

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Supplier Information	
Name of supplier:	
Address:	
Australian Business Number:	
Telephone:	
Email address:	
Contact person:	

1.0 Supplier Database	
1.1 Supplier's resource database is available on the web	
Yes/No	Comments:
1.2 Supplier's database is available online between 7.00 am and 7.00 pm Australian Eastern Standard Time	
Yes/No	Comments:
1.3 Suppliers database offers:	
<ul style="list-style-type: none"><li>Real-time bibliographic and order status information</li></ul>	

<b>Yes/No</b>	<b>Comments:</b>
	<ul style="list-style-type: none"> <li>Comprehensive listing of titles in all available formats (print, electronic etc.)</li> </ul>
<b>Yes/No</b>	<b>Comments:</b>
	<ul style="list-style-type: none"> <li>Ability to place firm orders via the database</li> </ul>
<b>Yes/No</b>	<b>Comments:</b>
	<ul style="list-style-type: none"> <li>Access to regular reports of the Library's orders</li> </ul>
<b>Yes/No</b>	<b>Comments:</b>
	<ul style="list-style-type: none"> <li>Ability to search via a number of entry points</li> </ul>
<b>Yes/No</b>	<b>Comments:</b>
	<ul style="list-style-type: none"> <li>Ability to set up email alerts for new titles</li> </ul>
<b>Yes/No</b>	<b>Comments:</b>
1.4 Each title entry in the database includes the following details:	
	<ul style="list-style-type: none"> <li>Title - including subtitle and series title if applicable</li> </ul>
<b>Yes/No</b>	<b>Comments:</b>
	<ul style="list-style-type: none"> <li>ISBN</li> </ul>
<b>Yes/No</b>	<b>Comments:</b>
	<ul style="list-style-type: none"> <li>Format</li> </ul>
<b>Yes/No</b>	<b>Comments:</b>
	<ul style="list-style-type: none"> <li>Publisher details including date and place of publication</li> </ul>
<b>Yes/No</b>	<b>Comments:</b>
	<ul style="list-style-type: none"> <li>Language</li> </ul>
<b>Yes/No</b>	<b>Comments:</b>
	<ul style="list-style-type: none"> <li>Size</li> </ul>

<b>Yes/No</b>	<b>Comments:</b>
	<ul style="list-style-type: none"> <li>• Pagination</li> </ul>
<b>Yes/No</b>	<b>Comments:</b>
	<ul style="list-style-type: none"> <li>• Price in Australian dollars</li> </ul>
<b>Yes/No</b>	<b>Comments:</b>
	<ul style="list-style-type: none"> <li>• Supplier reference number</li> </ul>
<b>Yes/No</b>	<b>Comments:</b>
	<ul style="list-style-type: none"> <li>• Ordering instructions – e.g. timing delays in ordering</li> </ul>
<b>Yes/No</b>	<b>Comments:</b>
	<ul style="list-style-type: none"> <li>• Readership level</li> </ul>
<b>Yes/No</b>	<b>Comments:</b>
	<ul style="list-style-type: none"> <li>• Subject classification</li> </ul>
<b>Yes/No</b>	<b>Comments:</b>
	<ul style="list-style-type: none"> <li>• Order status</li> </ul>
<b>Yes/No</b>	<b>Comments:</b>
	<ul style="list-style-type: none"> <li>• Availability</li> </ul>
<b>Yes/No</b>	<b>Comments:</b>
	<ul style="list-style-type: none"> <li>• Supplementary information where relevant e.g. geographic focus, contents notes</li> </ul>
<b>Yes/No</b>	<b>Comments:</b>
1.5 Supplier database will be available to the Library during the proposal evaluation process	
<b>Yes/No</b>	<b>Comments:</b>
1.6 The Library's account details, including approval plans, complete order and invoicing history can be added the Supplier's database	

<b>Yes/No</b>	<b>Comments:</b>
1.7 Vendor system is able to support the Library's ILS, currently Ex Libris Alma in terms of electronic ordering and invoicing	
<b>Yes/No</b>	<b>Comments:</b>
1.8 Supplier can provide licence to re-use bibliographic information for cataloguing purposes	
<b>Yes/No</b>	<b>Comments:</b>
1.9 If bibliographic records are supplied with materials, supplier will add holdings to the Libraries Australia database	
<b>Yes/No</b>	<b>Comments:</b>
1.10 Library notes can be added to title entries	
<b>Yes/No</b>	<b>Comments:</b>
1.11 Describe the method and frequency of update of your resource database	
<b>Comments:</b>	

<b>2.0 Ordering</b>	
2.1 Books will be supplied in accordance with agreed approval plan profiles (see section 3 below)	
<b>Yes/No</b>	<b>Comments:</b>
2.2 Purchase orders for book titles can be accepted via hardcopy, email and Electronic Data Interchange (EDI)	
<b>Yes/No</b>	<b>Comments:</b>
2.3 Supplier will adhere to all Library instructions	
<b>Yes/No</b>	<b>Comments:</b>
2.4 Confirmation/acknowledgement of new orders will be issued by email	
<b>Yes/No</b>	<b>Comments:</b>
2.5 Individual titles can be ordered as required, or as a replacement for damaged or missing titles	

<b>Yes/No</b>	<b>Comments:</b>
2.6 Order status reports will be delivered electronically on a fortnightly basis	
<b>Yes/No</b>	<b>Comments:</b>
2.7 Backlist titles can be supplied on firm order as well as current titles	
<b>Yes/No</b>	<b>Comments:</b>
2.8 Non-commercially and privately published titles can be supplied on firm order as well as current titles	
<b>Yes/No</b>	<b>Comments:</b>
2.9 Real-time ordering/acquisitions via APIs is available	
<b>Yes/No</b>	<b>Comments:</b>
2.10 How often are orders sent to publishers?	
<b>Comments:</b>	
2.11 Describe the frequency of, and the information included in order status reports	
<b>Comments:</b>	

<b>3.0 Approval Plans</b>	
3.1 Commercially published Australian books originating from across Australia are included	
<b>Yes/No</b>	<b>Comments:</b>
3.2 Specific criteria for selection and exclusion can be applied including price, region of publication, publisher, format, size, language, edition, genre, date of publication and subject as documented in the approval plans	
<b>Yes/No</b>	<b>Comments:</b>
3.3 Electronic slip lists/notifications can be provided for new material not received against approval plans	
<b>Yes/No</b>	<b>Comments:</b>
3.4 Supply will be accurate with high fulfilment rate and low error rate	

<b>Yes/No</b>	<b>Comments:</b>
3.5 Approval plans will only be changed by the Supplier with written authorisation from the Library	
<b>Yes/No</b>	<b>Comments:</b>
3.6 Approval plans will be amended as required by the Library	
<b>Yes/No</b>	<b>Comments:</b>
3.7 Regular meetings between supplier and Library will be held to review plans	
<b>Yes/No</b>	<b>Comments:</b>
3.8 Outline the process by which material is selected against the approval plans and steps taken to minimise error margins	
<b>Comments:</b>	

<b>4.0 Consolidation/Delivery</b>	
4.1 Titles will be delivered to the Library weekly	
<b>Yes/No</b>	<b>Comments:</b>
4.2 All titles will be delivered to the following address: Published Team, 2nd Floor State Library of New South Wales Macquarie Street SYDNEY NSW 2000 AUSTRALIA	
<b>Yes/No</b>	<b>Comments:</b>
4.3 Packing slips will list books alphabetically by title, with one packing slip and invoice per box	
<b>Yes/No</b>	<b>Comments:</b>
4.4 Describe any specific supply arrangements with publishers – e.g. agreements on freight, packaging, frequency etc. that will affect supply to the Library	
<b>Comments:</b>	

<b>5.0 Shipping &amp; Invoicing</b>	
5.1 Unless requested otherwise, one copy of each title will be shipped	
<b>Yes/No</b>	<b>Comments:</b>
5.2 Books will be shipped on a weekly basis, with the option to dispatch urgently if required	
<b>Yes/No</b>	<b>Comments:</b>
5.3 Books will be shipped on approval and reviewed on receipt. The Library reserves the right to return any not deemed suitable at the supplier's expense	
<b>Yes/No</b>	<b>Comments:</b>
5.4 Short payment of invoices can be authorised e.g. for return of damaged items or wrong titles	
<b>Yes/No</b>	<b>Comments:</b>
5.5 Box weight will be suitable for lifting and not exceed 10kg	
<b>Yes/No</b>	<b>Comments:</b>
5.6 Invoices will include invoice number, date of invoice, and currency	
<b>Yes/No</b>	<b>Comments:</b>
5.7 All tax invoices will be in Australian dollars	
<b>Yes/No</b>	<b>Comments:</b>
5.8 All tax invoices will be addressed to: Published Team, 2nd Floor State Library of New South Wales Macquarie Street SYDNEY NSW 2000 AUSTRALIA	
<b>Yes/No</b>	<b>Comments:</b>
5.9 The following information will be included on all tax invoices: order number, vendor address, billing address, order title, subscription or issues paid, invoice amount per unit price, freight and GST where applicable	
<b>Yes/No</b>	<b>Comments:</b>
5.10 GST and freight charges, if applicable, will be itemised separately	

<b>Yes/No</b>	<b>Comments:</b>
5.11 Invoices will be GST inclusive at the order line level	
<b>Yes/No</b>	<b>Comments:</b>
5.12 Tax invoices will be sent in hardcopy and via EDI to Ex Libris (Alma)	
<b>Yes/No</b>	<b>Comments:</b>
5.13 Invoices will be separated by account type e.g. approval plans, firm orders, e-books	
<b>Yes/No</b>	<b>Comments:</b>
5.14 Provide a sample tax invoice for evaluation	
<b>Upload file:</b>	

<b>6.0 Financial Statements &amp; Policies</b>	
6.1 Monthly statements will be provided in hardcopy by mail	
<b>Yes/No</b>	<b>Comments:</b>
6.2 All statements will include:	
<ul style="list-style-type: none"> <li>• Notification of payment terms</li> </ul>	
<b>Yes/No</b>	<b>Comments:</b>
<ul style="list-style-type: none"> <li>• The Library's account information</li> </ul>	
<b>Yes/No</b>	<b>Comments:</b>
<ul style="list-style-type: none"> <li>• Invoice/credit number</li> </ul>	
<b>Yes/No</b>	<b>Comments:</b>
<ul style="list-style-type: none"> <li>• Invoice/credit date</li> </ul>	
<b>Yes/No</b>	<b>Comments:</b>
<ul style="list-style-type: none"> <li>• Invoice/credit amount (itemise net amount, discount amount and GST)</li> </ul>	



<b>Yes/No</b>	<b>Comments:</b>
6.3 Copies of all invoices over three (3) months old can be provided via email	
<b>Yes/No</b>	<b>Comments:</b>
6.4 Describe how refunds from returned titles are handled	
<b>Comments:</b>	

<b>7.0 Trading Terms</b>	
7.1 Provide clear policies on pricing for books published commercially and non-commercially, freight, credit and extra charges; handling of replacement copies and other charges	
<b>Comments:</b>	
7.2 Provide your terms of trade policy for the following categories:	
<ul style="list-style-type: none"> <li>• Commercially published Australian materials</li> </ul>	
<b>Comments:</b>	
<ul style="list-style-type: none"> <li>• Government published Australian materials</li> </ul>	
<b>Comments:</b>	
<ul style="list-style-type: none"> <li>• Privately or self published Australian materials</li> </ul>	
<b>Comments:</b>	

<b>8.0 Reporting</b>	
8.1 The Library will have the capacity to run analytical reports on all activities from the Supplier's database and on request for the following:	
<ul style="list-style-type: none"> <li>• Number of titles</li> </ul>	
<b>Yes/No</b>	<b>Comments:</b>
<ul style="list-style-type: none"> <li>• Status of orders</li> </ul>	
<b>Yes/No</b>	<b>Comments:</b>

<ul style="list-style-type: none"> <li>Unsupplied orders</li> </ul>	
<b>Yes/No</b>	<b>Comments:</b>
<ul style="list-style-type: none"> <li>Ability to filter by a range of criteria including format and county of origin</li> </ul>	
<b>Yes/No</b>	<b>Comments:</b>
8.2 Describe the types of analytical reports that the Library can run, or that can be provided	
<b>Comments:</b>	
8.3 Would the Library have independent online access to reports?	
<b>Yes/No</b>	<b>Comments:</b>

## 9.0 Representation & Contact

9.1 Supplier will provide regular and reliable customer service contact with response to any enquiry within 48 hours

**Yes/No**      **Comments:**

9.2 Supplier visits to review performance and update product information will take place at least annually, including review of profiles

**Yes/No**      **Comments:**

9.3 Supplier will provide effective, proactive and responsive communication at operational and management levels

**Yes/No**      **Comments:**

9.4 Supplier will notify Library of any changes to company ownership/management structure

**Yes/No**      **Comments:**

9.5 Supplier will notify Library in advance of any changes to terms of trade and pricing policy

**Yes/No**      **Comments:**

9.6 Supplier will provide training on new features and developments e.g. shelf ready packaging

<b>Yes/No</b>	<b>Comments:</b>
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<b>10.0 References</b>	
10.1 Provide a list of contact details for at least three Library clients in Australia who use your services, for the Library to contact to verify your response to the EOI	
<b>Name of Library:</b>	
<b>Address:</b>	
<b>Telephone:</b>	
<b>Email address:</b>	
<b>Contact person:</b>	
<b>Name of Library:</b>	
<b>Address:</b>	
<b>Telephone:</b>	
<b>Email address:</b>	
<b>Contact person:</b>	
<b>Name of Library:</b>	
<b>Address:</b>	
<b>Telephone:</b>	
<b>Email address:</b>	
<b>Contact person:</b>	
10.2 Provide the names of one or two clients who use your company's services for electronic invoices and who have Ex Libris Alma system in place, for the Library to contact about workflow planning	
<b>Name of Client:</b>	
<b>Address:</b>	
<b>Telephone:</b>	
<b>Email address:</b>	
<b>Contact person:</b>	
<b>Name of Client:</b>	
<b>Address:</b>	
<b>Telephone:</b>	
<b>Email address:</b>	
<b>Contact person:</b>	