



EOI for supply of purchased books (US, UK & European) 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 \(US, UK & European\)](#).

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

Contact Officer for queries:

Zoe Melling

Specialist Librarian, Published Collections

State Library of New South Wales

Ph: 02 92731621

Email: zoe.melling@sl.nsw.gov.au

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">Real-time bibliographic and order status information	

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

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

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

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

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

3.0 Approval Plans	
3.1 Printed books published outside Australia (US, UK and specific European coverage) are included	
Yes/No	Comments:
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	
Yes/No	Comments:
3.3 Electronic slip lists/notifications can be provided for new material not received against approval plans	
Yes/No	Comments:
3.4 Supply will be accurate with high fulfilment rate and low error rate	

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

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

5.0 Shipping & Invoicing	
5.1 Unless requested otherwise, one copy of each title will be shipped	
Yes/No	Comments:
5.2 Books will be shipped on a weekly basis, with the option to dispatch urgently if required	
Yes/No	Comments:
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	
Yes/No	Comments:
5.4 Short payment of invoices can be authorised e.g. for return of damaged items or wrong titles	
Yes/No	Comments:
5.5 Box weight will be suitable for lifting and not exceed 10kg	
Yes/No	Comments:
5.6 Invoices will include invoice number, date of invoice, and currency	
Yes/No	Comments:
5.7 All tax invoices will be in country of origin currency	
Yes/No	Comments:
5.8 All tax invoices to be addressed to: Published Team, 2nd Floor State Library of New South Wales Macquarie Street SYDNEY NSW 2000 AUSTRALIA	
Yes/No	Comments:
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	
Yes/No	Comments:
5.10 GST and freight charges, if applicable, will be itemised separately	

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

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

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

7.0 Trading Terms	
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	
Comments:	
7.2 Provide your terms of trade policy for the following categories:	
<ul style="list-style-type: none"> • Commercially published US/UK/European materials 	
Comments:	
<ul style="list-style-type: none"> • Government published US/UK/European materials 	
Comments:	
<ul style="list-style-type: none"> • Privately or self published US/UK/European materials 	
Comments:	

8.0 Reporting	
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"> • Number of titles 	
Yes/No	Comments:
<ul style="list-style-type: none"> • Status of orders 	
Yes/No	Comments:

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

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

Yes/No	Comments:
---------------	------------------

10.0 References

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

Name of Library:	
Address:	
Telephone:	
Email address:	
Contact person:	

Name of Library:	
Address:	
Telephone:	
Email address:	
Contact person:	

Name of Library:	
Address:	
Telephone:	
Email address:	
Contact person:	

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

Name of Client:	
Address:	
Telephone:	
Email address:	
Contact person:	

Name of Client:	
Address:	
Telephone:	
Email address:	
Contact person:	