



**Request of Proposal No. 423
To Provide For
The Purchase, Cataloging and Processing
Of New Books**

Due: June 9, 2021 at 3:30 PM

Original Response

Submitted By:

INGRAM®

One Ingram Blvd.
La Vergne, TN 37086-1986
Federal ID # 62-1746696
(800) 937-5300



Jefferson Parish
Department of Purchasing
P.O. Box 9
Gretna, Louisiana 70054

Re: Request for Proposals – The Purchase, Cataloging and Processing of New Books
Due: June 9, 2021 at 3:30 PM

Dear Purchasing Agent:

Thank you for including Ingram Library Services LLC in your search for vendors to provide the Purchase, Cataloging and Processing of New Books Jefferson Parish Library (JPL). As an Ingram Content Group company, we offer a full range of content and services. We are willing and able to perform the commitments contained in our proposal response to RFP #0423 With our unmatched on-hand inventory of books and materials plus over four decades of experience in distributing library materials, we serve libraries like JPL with a wide range of collection development, processing, and cataloging services that are guaranteed to enhance your collections and please both your staff and patrons.

Ingram understands all the services required for this contract. We will not only meet, but exceed the Library's expectations through the following:

Ingram's on-hand inventory translates into the broadest range of titles and highest fill rates for your project.

- ◆ Ingram leads the book industry in maintaining the largest **on-hand inventory of over 16,000,000 unique titles, representing over 60,000 book publishers and imprints.**
- ◆ Ingram can provide 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, prebound books, and big books.
- ◆ Our spoken word audio inventory **of 109,000+ titles**, includes abridged and unabridged editions in a variety of formats including CD, MP3 and Playaway formats.
- ◆ With **79,000+ DVD and 12,000+ Blu-ray titles**, Ingram offers one of the most comprehensive inventories of DVDs in the country. We also inventory more than **400,000 music titles** on Compact Disc, from classical to popular titles.
- ◆ Ingram currently inventories over **250,000 Spanish titles** in our distribution centers, including adult and children's titles. 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.
- ◆ Lightning Source is Ingram's **print-on-demand** company. With national and international facilities, Lightning Source has a **virtual inventory of over 17,000,000 titles representing more than 85,000 publishers.** Once an order is placed by a Library, we have all the electronic data necessary to print and deliver the book to its intended destination. Print on demand allows for a book to be printed in order in a range of formats within 24 hours, even if the order is for one copy.
- ◆ Ingram Publisher Services Inc. represents more than 650 publisher clients from around the world, which agree to allow Ingram to be the **exclusive distributor** of their product. The advantage this



- ◆ brings to our library customers is the guaranteed availability of current titles from these publishers at Ingram distribution centers. As the exclusive distributor of these publishers, even other vendors source these purchases from Ingram.

Ingram's Collection Development Team is recognized for their expertise and world-class service:

- ◆ Our Collection Development Team is comprised of a group of dedicated MLS-degreed Librarians, each with frontline experience in libraries.
- ◆ Ingram provides a number of selection lists through ipage including regularly updated lists under the Browse tab or via our 22 standing order programs. Our programs are driven by customizable profiles, and can be used as stand-alone programs, or in combination to deliver the content you require.
- ◆ Our Librarians can also provide specialized selection lists for the Library. These lists can be provided via ipage, on the Library's Home Page Right. Additionally, our staff of MLS-degreed librarians can create customized Collection Development lists for the Library delivered in an Excel format that contains key metadata and links to title detail in ipage. Any ipage list or customized Collection Development list can be loaded into the Library's integrated library system for ordering.
- ◆ We support a workflow that allows Standing Order titles to also be loaded into the Symphony system prepublication. This allows patrons to be able to place holds, as well as allows for EDI ordering, and EDI invoicing utilizing the same workflow as other orders.

Ingram provides stability and experience:

- ◆ 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. 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.
- ◆ Ingram has emerged as the one of the largest book distributors in the industry, shipping over **95,000 units** across the nation **each day** from our regional distribution centers.

Ingram is the industry leader in customer support and services:

- ◆ Ingram is known in the book industry for our integrity and for our commitment to deliver product and services at the best terms and at the promised discounts. Ingram's service levels are unsurpassed in the industry, and our terms are clearly stated, without any hidden fees or service charges.
- ◆ Ingram will give the highest priority to your needs by assigning key Ingram professionals to work with the Library, including:
 - Jessica Short, Manager, Client Integration (JPL Project Manager)
 - Stephen Casey, Senior Sales Representative
 - Erin Eggert, Inside Sales Representative
 - Judy Stone, Account Services Coordinator
 - Jeanette Russell, Custom Cataloging Coordinator
- ◆ Ingram fully supports EDI on Sirsi Dynix Symphony platform using the X12 protocol, including orders, purchase order acknowledgments, Advance Shipment Notification (ASN) and invoices.



- ◆ Ingram is the leading provider of account specific information available. Through our **ipage** account management tool, your Library account specific information is available and accessible at your convenience, **24 hours a day, 7 days a week, for no charge.**
- ◆ ipage is also the ultimate online collection development and ordering tool for librarians, combining the industry's largest inventory with complete information, collection development resources, reviews, and real-time stock check.
- ◆ Our shelf-ready services offered for this project include processing and cataloging to your exact specifications.
- ◆ Ingram can provide customized reporting based on open and closed order data to keep your project on track.
- ◆ During and after the account set up, profiling and training process, you can expect the ongoing involvement of **Stephen Casey**, as well as an assigned Inside Sales Representative, who will provide open lines of communication between the Library's staff and Ingram Departments including Credit and Customer Service.

With the broadest selection of content, outstanding collection development services, and shelf-ready options tailored to your Library; Ingram has the inventory and expertise to successfully partner with Jefferson Parish Library as your primary vendor.

Name and address of firm:

Ingram Library Services LLC
One Ingram Blvd.
P.O. Box 3006
La Vergne, TN 37086-1986
Telephone No.: (800) 937-5300
Fax: 615-213-5196
Email: ilsbids@ingramcontent.com

URL: <http://www.ingramcontent.com/pages/libraries.aspx>
ipage: www.ipage.ingramcontent.com

Official Representative:

Pamela R. Smith, Vice President and General Manager

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Request for Proposals #0423

**Purchase, cataloging and processing of new books for the
Jefferson Parish Library Department**

SIGNATURE PAGE

The Jefferson Parish Department of Purchasing is soliciting Request for Proposals (RFP'S) from qualified proposers who are interested in providing New Shelf Ready Books for the for the Jefferson Parish Library Department.

Request for Proposals will be received until 3:30 p.m. Local Time on: June 9, 2021.

Acknowledge Receipt of Addenda: Number: 1
Number: _____
Number: _____
Number: _____
Number: _____
Number: _____

Name of Proposer: Ingram Library Services LLC

Address: One Ingram Blvd
La Vergne, Tennessee 37086

Phone Number: 800-937-5300 Fax Number 615-213-6004

Type Name of Person Authorized to Sign: Pamela R. Smith

Title of Person Authorized to Sign: Vice President and General Manager

Signature of Person Authorized to Sign: 

Email Address of Person Authorized to Sign: ilsbids@ingramcontent.com

Date: June 8, 2021

This RFP signature page must be signed by an authorized Representative of the Company/Firm for proposal to be valid. Signing indicates you have read and comply with the Instructions and Conditions.

INGRAM LIBRARY SERVICES LLC
WRITTEN CONSENT OF THE SOLE MEMBER
IN LIEU OF MEETING

Pursuant to the Tennessee Revised Limited Liability Company Act, the undersigned, being the sole member of Ingram Library Services LLC, a Tennessee limited liability company (the "Company"), does by the signing hereof, consent to the adoption of and does hereby adopt and take the following resolutions:

Officer Election

RESOLVED, That the appointment of Pamela R. Smith as Vice President and General Manager, ILS of the Company, effective June 1, 2018, is hereby ratified and confirmed.

Contract Signing Authority

WHEREAS, in the normal course of business, the Company is required to enter into contracts for the sale of library books and other materials with various federal, state and local governmental departments and agencies (the "Contracts"); and

WHEREAS, time is of the essence in the execution and delivery of the Contracts on behalf of the Company;

NOW, THEREFORE, BE IT RESOLVED, That the following officers of the Company be and each is hereby authorized to execute and deliver the Contracts in the name of and on behalf of the Company upon such terms and conditions as the officer signing deems appropriate and in the best interest of the Company:

Shawn R Everson, President

Shawn D. Morin, Chief Executive Officer

Pamela R. Smith, Vice President and General Manager, ILS


FURTHER RESOLVED, That, in the absence of the officers listed above, Kelly Lynne-Schadel Arnold, Assistant Secretary of the Company, and Brian K. Dauphin, Authorized Representative of the Company, are each hereby authorized to execute and deliver the Contracts in the name of and on behalf of the Company upon such terms and conditions as she or he deems appropriate and in the best interest of the Company.

FURTHER RESOLVED, That the effective date of these resolutions will be June 1, 2018.

Dated the 1st day of June, 2018.

SOLE MEMBER:

Ingram Industries Inc.



By: John R. Ingram
Chairman of the Board

June 1, 2018

Request for Proposal

AFFIDAVIT

STATE OF Tennessee

PARISH/COUNTY OF Rutherford

BEFORE ME, the undersigned authority, personally came and appeared: _____

Pamela R. Smith, (Affiant) who after being by me duly sworn, deposed and said that he/she is the fully authorized Vice President and General Manager of Ingram Library Services LLC (Entity), the party who submitted a proposal in response to RFP Number 0423, to the Parish of Jefferson.

Affiant further said:

Campaign Contribution Disclosures

(Choose A or B, if option A is indicated please include the required attachment):

Choice A _____ Attached hereto is a list of all campaign contributions, including the date and amount of each contribution, made to current or former elected officials of the Parish of Jefferson by Entity, Affiant, and/or officers, directors and owners, including employees, owning 25% or more of the Entity during the two-year period immediately preceding the date of this affidavit or the current term of the elected official, whichever is greater. Further, Entity, Affiant, and/or Entity Owners have not made any contributions to or in support of current or former members of the Jefferson Parish Council or the Jefferson Parish President through or in the name of another person or legal entity, either directly or indirectly.

Choice B ✓ there are **NO** campaign contributions made which would require disclosure under Choice A of this section.

Affiant further said:

Debt Disclosures

(Choose A or B, if option A is indicated please include the required attachment):

Choice A _____ Attached hereto is a list of all debts owed by the affiant to any elected or appointed official of the Parish of Jefferson, and any and all debts owed by any elected or appointed official of the Parish to the Affiant.

Choice B ✓ There are **NO** debts which would require disclosure under Choice A of this section.

Affiant further said:

Solicitation of Campaign Contribution Disclosures

(Choose A or B, if option A is indicated please include the required attachment):

Choice A _____ Attached hereto is a list of all elected officials of the Parish of Jefferson, whether still holding office at the time of the affidavit or not, where the elected official, individually, either by **telephone or by personal contact**, solicited a campaign contribution or other monetary consideration from the Entity, including the Entity's officers, directors and owners, and employees owning twenty-five percent (25%) or more of the Entity, during the two-year period immediately preceding the date the affidavit is signed. Further, to the extent known to the Affiant, the date of any such solicitation is included on the attached list.

Choice B ✓ there are **NO** solicitations for campaign contributions which would require disclosure under Choice A of this section.

Affiant further said:

That Affiant has employed no person, corporation, firm, association, or other organization, either directly or indirectly, to secure the public contract under which he received payment, other than persons regularly employed by the Affiant whose services in connection with the construction, alteration or demolition of the public building or project or in securing the public contract were in the regular course of their duties for Affiant; and

That no part of the contract price received by Affiant was paid or will be paid to any person, corporation, firm, association, or other organization for soliciting the contract, other than the payment of their normal compensation to persons regularly employed by the Affiant whose services in connection with the construction, alteration or demolition of the public building or project were in the regular course of their duties for Affiant.

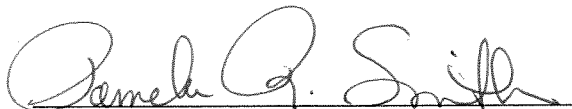
Affiant further said:

Subcontractor Disclosures

(Choose A or B, if option A is indicated please include the required attachment):

Choice A _____ Affiant further said that attached is a listing of all subcontractors, excluding full time employees, who may assist in providing professional services for the aforementioned RFP.

Choice B ✓ There are **NO** subcontractors which would require disclosure under Choice A of this section.


Signature of Affiant

Pamela R. Smith
Printed Name of Affiant

SWORN AND SUBSCRIBED TO BEFORE ME

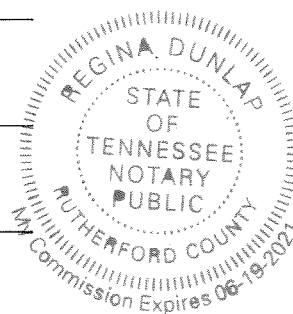
ON THE 8th DAY OF June, 2021.

Regina Dunlap
Notary Public

Regina Dunlap
Printed Name of Notary

Notary/Bar Roll Number

My commission expires 6/19/21.



ATTACHMENT "B"

Ability to meet specifications

This must be filled in by each vendor and included with the other documents submitted in response to the technical portion of this RFP.

Number of titles (unique ISBN/EAN) currently in stock
in vendor's inventory

13,500,000

Method of notification of best sellers, continuations
and other popular books

Email

Vendor has program which guarantees that items such
as best sellers ordered through a prescheduled ordering
plan arrive at library at least by street date (y/n)

Yes

Vendor can supply books in Class A (y/n)

Yes

Vendor can supply books in Class B (y/n)

Yes

Vendor can supply books in Class C (y/n)

Yes

Vendor can supply books in Class D (y/n)

Yes

Vendor can supply books in Class E (y/n)

Yes

Vendor must be able to provide opening day
collections (y/n)

Yes

URL of vendor's online electronic ordering system,
including password if necessary

<https://www.ingramcontent.com/libraries>

[https://: www.ipage.ingramcontent.com](https://www.ipage.ingramcontent.com)

Vendors can provide downloadable purchase order
records (y/n) (Library will contact vendor to obtain
sample record)

Type text here
Type text here
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	Yes
Vendor can provide and apply dust jackets and plastic laminate as specified (y/n)	Yes
Vendor can provide and apply branch labels as specified (y/n)	Yes
Vendor can produce and apply barcodes as specified (y/n)	Yes
Vendor can print and apply spine label according to Jefferson Parish Library specifications (y/n)	Yes
Vendor can print and apply BISAC subject heading label according to specifications (y/n)	Yes
Vendor can provide MARC label according to library specifications (y/n)	Yes
Vendor can insert item information into item record which will produce and populate item information (y/n) (Library will contact vendor to obtain sample record)	
Vendor can provide, apply, and program Bibliotheca's NXP SLIX2 tags	Yes
Vendor can assign a call number (Dewey Decimal) and Cutter letters and numbers according to specifications (y/n)	Yes
Vendor can assign BISAC subject headings according to specifications (y/n)	Yes
Vendor will provide inside delivery of all items at no cost (y/n)	Yes
Vendor will provide delivery as specified (y/n)	Yes
Vendor will provide two copies of invoice in the box with delivered books (y/n)	Yes
Vendor will provide a cancellation schedule for those items which become unavailable (y/n)	Yes
Vendor will pay all return shipping charges (y/n)	

	Yes
Vendor will issue credit memo or invoice as specified (y/n)	<u>4</u>

Vendor has how many warehouses?

The primary warehouse from which orders for Jefferson Parish Library will be filled is
Fort Wayne, Indiana

The secondary warehouse from which orders for Jefferson Parish Library will be filled is
La Vergne, Tennessee

PART II - SCOPE OF WORK/SERVICES

2.1 Scope of Work/Services

All pricing includes shipping cost. **Ingram has completed the sheets indicating our percentage discount for each category**

Ingram can provide adult, young adult, and juvenile fiction and nonfiction titles in all subjects and genres in a variety of bindings including trade hardcover, trade quality paper, mass market paper, single library editions, publisher's library editions, graphic novels, board books, and big books. Ingram stocks not only new best sellers, but also the deepest inventory of midlist and backlist titles of any vendor. Ingram carries books in large quantities to meet library demand for multiple copies.

Definitions of Binding Types and Presses

Discounts are applied to the publisher's current list price. Prior to placing an order, the Library can determine estimated discounted pricing for an entire list by utilizing the *Price this List* feature on ipage.

In determining which titles receive less than full trade discounts, Ingram has utilized its best efforts to categorize 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.

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.

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.

Textbooks, Technical, Scientific, Reference and 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 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. **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.

Selection:

1. Ingram leads the industry in maintaining an **on-hand inventory of over 16,000,000 unique titles, representing over 60,000 book publishers and imprints.** Our unmatched nationwide inventory of over **35,000,000 books** ensures the highest fill rates in the industry.

- Ingram's on-hand inventory represents the largest range of publishers in the wholesale distribution business today including all binding types and formats.
- Ingram 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.
- Ingram stocks not only new best sellers and award-winning titles, but also the deepest inventory of midlist and backlist titles of any vendor.

Ingram can provide 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.

Category	Titles Carried	Volumes
Trade Hardcover	448,861	21,010,831
Trade Paperback (Quality)	2,993,122	35,387,347
Mass Market Paperback	25,663	881,203
Non-Trade/Short Discounted	8,280,743	2,021,008
Technical, Science, Reference, Legal, DUP	927,519	10,394,699
Library Binding Editions	71,870	106,220
Net	4,867,707	2,604,408

Our inventory also includes over 18,000 prebound titles from Perfection Learning and San Val. Additionally, Ingram can provide paperback prebinding services through our partnership with Heckman HCL.

Ingram maintains at least 80% of stock titles on an average from both your primary and secondary distribution centers to sustain the best fill rate and meet the demands of our customer base. Listed below are the percentages as of June 7, 2021.

DC	Titles	Titles On-Hand	% On-Hand
NASHVILLE/FT WAYNE	17,675,484	15,968,458	90.3%

***On-hand titles count in the Nashville DC includes print-on-demand titles*

Ingram Publisher Services LLC

Ingram Publisher Services LLC, an Ingram Content Group company, represents more than 650 publisher clients from around the world, which agree to allow Ingram to be the exclusive distributor of their product. Built on a longstanding tradition of Ingram quality, IPS provides our customers with a wide variety of books and book related product from an outstanding roster of publishers, with easy ordering options, fast delivery, and excellent service. The advantage this brings to our library customers is the guaranteed availability of current titles from these publishers at Ingram distribution centers. **As the exclusive distributor of these publishers, even other vendors source these purchases from Ingram.**

Print on Demand through Lightning Source

With national and international facilities, Lightning Source LLC, an Ingram Content Group company, has a virtual inventory of over 17,000,000 titles representing more than 85,000 publishers. We print only what is needed to meet our customers' current demand-whether that's a single book order or 10,000. We not only give you access to content that was once out of print or hard-to-find, but also make it possible for low-volume titles to stay in print and for new titles to be released. All this translates into wider title selection and better customer service for your patrons and your community.

Once an order is placed, we have all the electronic data necessary to print and deliver the book to its intended destination. The distance between book-maker and book-reader has never been shorter. Print on demand allows for a book to be printed in order in a range of formats within 24 hours, even if the order is for one book. On average, we print over 4,000,000 books per month.

Lightning Source and Ingram Publisher Services titles are listed on ipage and are ordered through the same methods you usually use with Ingram - by telephone, fax, mail, or electronically. There is no need to use a separate account or purchase order. Lightning Source titles will be printed especially for you once the order is placed.

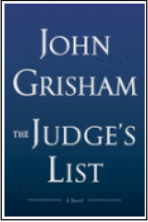
2. Ingram understands the importance of getting high-visibility titles in the hands of Library patrons as soon those titles appear in local bookstores. Titles designated as part of the **Street Smart** program include any upcoming new releases with a publisher-assigned on-sale date. Working within the publishers' parameters, Ingram profiles the Library's account so Street Smart titles shipped from the primary distribution center are received on or before the on-sale date.

To receive Street Smart designated titles on or before the on-sale date, the Library is required to complete a signed affidavit in which you agree not to display, sell, or loan for advanced reading any title before the publisher-assigned on-sale date. Without this agreement, Ingram cannot ship Street Smart titles until one day before the published on-sale date. All wholesale distributors are held to these standards, and Ingram is dedicated to ensuring that we do not violate our agreements with publishers.

Occasionally, the publisher may designate a title as having stricter on-sale date parameters. Ingram designates these types of titles as **Street Smart Select**. These are usually major releases that typically have large print runs and major publicity scheduled. Similar to a standard street date, a title specific signed affidavit is required to receive advance delivery. Ingram will provide advance notification of these titles, including any order deadlines or minimum order quantities required to participate in the early delivery program. Per the publisher, Distributors are not allowed to deliver Street Smart Select titles until one day before the on-sale date.

[<previous product in list](#) | [return to list](#) | [next product in list>](#)

The Judge's List - Street Smart
Contributor(s): [Grisham, John \(Author\)](#)



ISBN: 0385546025 EAN: 9780385546027
Publisher: [Doubleday Books](#) ([View Publisher's Titles](#))

US SRP: \$29.95 US

Binding: Hardcover

Pub Date: October 19, 2021

Copyright Date:

Street Date: October 19, 2021 ← **Street Smart**

Publisher Marketing:
From the #1 *New York Times* bestselling author, a new legal thriller about a man who might be the most criminal sitting judge in American history

As an investigator for the Florida Board on Judicial Conduct, Lacy Stoltz sees plenty of ...

Formats:

Binding/Format	Priced From
Audio	\$45.00
Paperback	\$32.00
Hardcover	\$29.95

[View All Formats](#)

†Price and discount are subject to change
This item is Returnable

Ingram does not control publishers' street dates or their specialized parameters. We work closely with publishers to obtain news of publishing date changes or unexpected releases are added with limited advance notice of publication. We provide updated information through ipage as soon as it is available from the publisher. The Library can check any title as the scheduled street date approaches to ensure no change has been made.

Ingram will make every available effort to ship titles to arrive before the street date for those libraries having a Street Smart affidavit on file; however, we cannot guarantee arrival on or before street date. Delivery within the allotted time frame is contingent upon the publisher providing books to Ingram in a timely manner. Occasionally, our ability to comply may be compromised on a title due to circumstances outside of our control such as weather delays or delay in receipt from the publisher. In such instances, the level of custom processing or cataloging profiled on a Library account may cause the title to be delivered after street date.

3. Opening Day Collection Services

At Ingram Library Services, our goal is to help you create a library that is as unique as your community. With our inventory and expertise, Ingram can provide you with a balanced collection ready for your shelves. Our profiling program provides a clear picture of your collection needs while taking your timeline and budget into account. We also have customizable processing and cataloging services designed to save time on routine collection development functions.

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 thoroughly detailed 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 so they can circulate as soon as possible.
- **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, our aim is that you rest easy on Opening Day. Your order has been managed and shipped with care based on your specifications, but reliable service does not end at delivery. We follow up in case there are questions or additional needs because we are always standing by to support you.

Ingram wrote the book on Opening Day Collections, and when you start a project with us, we provide you with this *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 can serve as your guide to every step of an ODC project. It includes:

Interactive Resources

- Library ODC Project Checklist
- Opening Day Collection Handbook
- 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 the titles and quantities and 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* will help keep you from missing any important step of the journey, from budgeting, to allocating shelf space, to celebrating milestones. Not only can it be a tool for you to use as a guide to ensure a successful project, it can serve as a reporting tool for your administration and funding partners so that they can also be kept abreast of the project. We know that the collection is just one part of a building, renovation, or refresh project. We want to make sure that you don't have to sweat the details alone.

By providing a Project Manager to you who is 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 who are ready and willing to partner to make your project successful.

At the beginning of the ODC process, you will be assigned a Project Manager at Ingram who will serve as your consistent partner throughout the process. The Project Manager will bring together other Ingram staff members who are experts in their areas, such as Collection Development, Cataloging, and Logistics. Together, they will ensure that your project is executed on your timeline and within your budget. The Project Manager will also ensure that no detail is forgotten and 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 most likely not be lessened. Therefore, we will ensure that you can stay focused on your primary job, and we will make sure that everything stays on track and will let you know if there is 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 will be the highest quality with the most relevant information presented. These lists will be created after our Collection Development librarians have a complete and thorough understanding of the library community and patronage being served. The goal is for 50% of the material selected to circulate in the first 180 days.
- ✓ The material will be processed and cataloged to the exact specifications of the library for each material type and part of the collection. Ingram's Account Services team will work with the library to ensure that all specifications are understood, and all anomalies addressed. Ingram will strive for 100% accuracy of Cataloging & Processing for each ODC that is delivered.
- ✓ The delivery will be made on the date and to the location as specified by the library. Ingram will ensure a professional delivery in compliance with each library's wishes. Ingram will have personnel on-site for delivery.

In the first days of your project, Ingram's Project Manager will work with you to get your C&P portal completed and your accounts set up. The C&P portal will give Ingram an in-depth view of what your C&P requirements are for the project. If Ingram does not already catalog & process your items, or if you need different cataloging and/or processing services, you will need to complete the portal. The Ingram team will provide items for testing before beginning to process the whole of the collection to ensure accuracy and functionality.

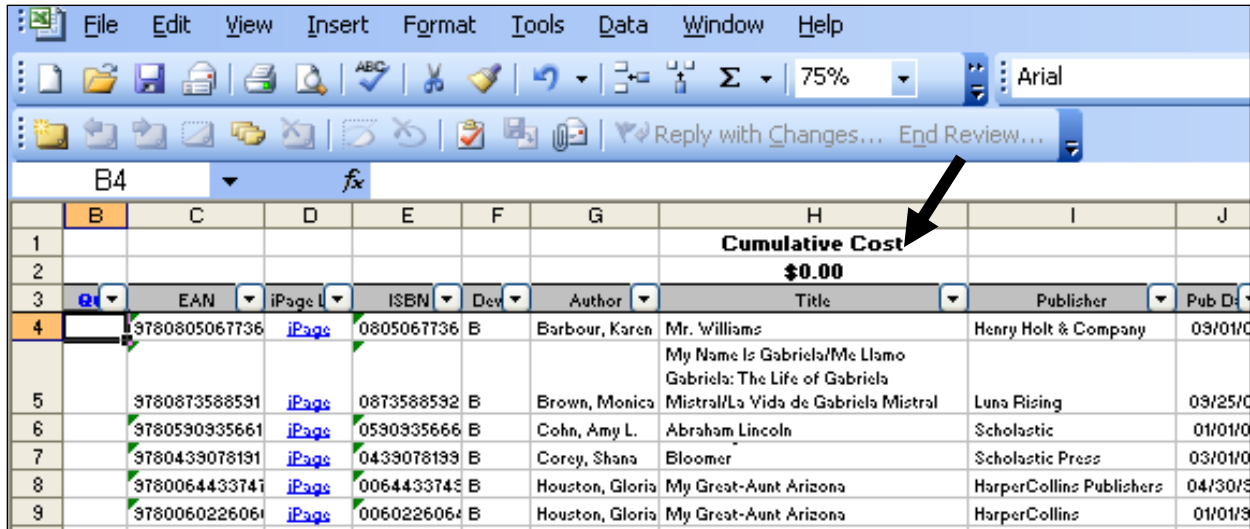
Once your C&P specs are completed, we will have you fill out a Collection Development profile to help us understand the parameters and details of your project.

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

We will work with you to 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. We are happy to consult with your selectors about your library's philosophy of Collection Development before deciding on the proper mix of titles for your lists.

The selection lists will be approximately one and a half times your stated dollars or units to allow for your flexibility. The lists will be delivered 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:



	B	C	D	E	F	G	H	I	J
1							Cumulative Cost		
2							\$0.00		
3	Q1	EAN	iPage	ISBN	Dev	Author	Title	Publisher	Pub D
4		9780805067736	iPage	0805067736	B	Barbour, Karen	Mr. Williams	Henry Holt & Company	03/01/0
							My Name Is Gabriela/Me Llamo Gabriela: The Life of Gabriela		
5		9780873588591	iPage	0873588592	B	Brown, Monica	Mistral/La Vida de Gabriela Mistral	Luna Rising	03/25/0
6		9780590935661	iPage	0590935666	B	Cohn, Amy L.	Abraham Lincoln	Scholastic	01/01/0
7		9780439078191	iPage	0439078199	B	Corey, Shana	Bloomer	Scholastic Press	03/01/0
8		9780064433747	iPage	0064433748	B	Houston, Gloria	My Great-Aunt Arizona	HarperCollins Publishers	04/30/8
9		9780060226061	iPage	0060226064	B	Houston, Gloria	My Great-Aunt Arizona	HarperCollins	01/01/8

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 that will be housed inside. In our years of ODC experience, we have accommodated a variety of different delivery types and will work with you and your team to plan a delivery schedule that streamlines a receiving workflow conducive to setting your new library up as quickly and as painlessly as possible.

We charge no warehousing fees for ODC projects. Often, you and your team will find it easier to receive the entirety of the project at one time. We can coordinate with your schedule to plan a specific delivery date.

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 \$.45 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!

The pledge of Ingram Library Services is that the selection and delivery of materials will be the best and easiest part of the ODC process.

Pricing: Complimentary if Ingram-created lists are purchased solely from Ingram

ODC Payment Terms

For opening day collections, Ingram can store product and ship to you at an agreed upon date under the following terms. Items will be invoiced when they are moved to storage in an Ingram facility after

receiving processing and cataloging services, and are payable within 30 days EOM. Ownership and title of said product passes to the Library upon invoice.

Ordering:

4. Ingram can accept orders by toll-free phone, toll-free fax, mail, electronically, (via email attachment and/or EDI – Electronic Data Interchange), or through ipage. All orders receive immediate online order entry; phone and electronic orders receive title and stock verification. For ease and efficiency, we can confidently claim to be the best in the business in order entry.

ipage is Ingram's online collection development and ordering tool for librarians, combining the industry's largest inventory with complete title information, 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**.

ipage can be accessed at <https://ipage.ingramcontent.com>. Through ipage, your Library account specific information is available and accessible at your convenience, **24 hours a day, 7 days a week**.

ipage Searching

- **Simple Search** is displayed at the top of every page within ipage, and allows for fast and quick search of titles. Among the simple search options for print books are Title Keyword, Start of, Phrase, or Exact Title; Author; ISBN/EAN; Keyword(s); Series; Dewey.
- **Power Search** allows ipage users to focus their search to a much narrower list of titles by using some or all of a specific set of search criteria. Through Power Search, ipage users can look for titles by publisher, subject heading, format, language, and other filters not listed on the simple search feature. Search criteria can be input for up to 25 data points, and the more search criteria added, the fewer results the search will return.
- **Boolean searching** is like power searching, but is mainly focused on criteria for the Title, Contributor, Publisher, BISAC, Ingram Theme, and Series fields and uses Boolean terms. The user may also put search criteria on Language, Age Group, Binding, Publication Date, etc. Under "further criteria", Boolean searching allows the user to select multiple attributes.
- **Predictive Search** is an optional functionality on ipage that allows for more accurate and efficient searches across our entire database. This technology uses our top-demanded product data to offer suggested completions of the search term you are typing into the search bar, including Title (Start of) and Author.
- **Street Smart Titles** list under the Browse tab on ipage enables libraries to view a listing of titles that have a hard street date from the publisher. This Street Smart list focuses on titles up to 18 months' pre-publication.
- **Search results** can be sorted by the Title, Author, EAN/ISBN, Binding, Publisher, Pub Date, or SRP, and users can quickly jump to specific places in the result set by letter. The Search Result View also contains options at the item level. For each item, the user can perform actions such as Duplicate Check, Add or Edit Grid Information, or Edit other information about the item. ipage combines the robust functionality of Selection Lists with the filter options currently available for Search Results. This means that you can filter the items in your selection list by all of the refinement options already available for Search Results.


- **Saved Searches.** This time-saving option is a great way to organize searches a user might perform on a regular basis. Searches can be saved as a new search or as a replacement for an existing search. Saved searches are automatically purged from the user's account 13 months after the last accessed date, which is shown on ipage.

A Title Detail page on ipage includes title, contributor (author, illustrator, editor, etc.), ISBN/EAN, publisher or studio, suggested retail price, binding or format, pub date or release date, and copyright date. Details may also include any of the following as provided in the publisher metadata: cover image, BISAC categories, LC subjects, themes, OCLC number, Dewey, LC subjects, series, awards, features (Index, Price on Product, Excerpt, Illustrated, Maps), initial print run, target age group, physical information (dimensions, weight, number of pages), carton quantity, annotation, description, publisher marketing, review citations, review quotes, biographical notes, and full text reviews. Children's titles may include Accelerated Reader®, Scholastic Reading Counts!™, and Guided Reading Level information. ipage Title Detail screen shows alternate bindings/formats for a title, when available.

5. Real Time Stock Checking

ipage provides a real time stock check of Ingram inventory directly on the Title Detail screen. The Library's assigned primary and secondary distribution centers will be displayed. ipage shows both on hand inventory and number of copies on order with the publisher, and for titles on order, may include the estimated arrival date at Ingram.

The Midnight Library

Contributor(s): [Haig, Matt](#) (Author) 



ISBN: 0525559477 EAN: 9780525559474
Publisher: [Viking](#) ([View Publisher's Titles](#))

US SRP: \$26.00 US [\\$ Price this Title](#)

Binding: Hardcover

Pub Date: September 29, 2020


Copyright Date:

Annotation:
"Good morning America book club"--Jacket.

Formats:

Binding/Format	Priced From
Audio More Audio >	\$29.99
Library Binding	\$36.99
Hardcover	\$26.00
View All Formats	

This item is Returnable

Qty	1	Add to Quick Order
View/Edit Cart		
DC	On Hand	On Order
TN PRIMARY	814	420 
IN SECONDARY	1,062	0
Show More ▼		
No Processing/Cataloging Services		

Note that "On Order" stock for DVD titles shown on ipage reflects the inventory level in the Ingram Entertainment distribution center. Upon order, they are received in our distribution center in 24 hours.

In addition, stock check is available when looking at lists of titles either through search results or on selection lists, without having to go to the detail page for individual titles.

The Library can view stock levels in each distribution center for each item in your selection list by clicking on the *Stock Availability* link.

This gives a snapshot of current availability of titles from the designated Primary and Secondary distribution centers, and also indicates if titles are not currently in stock and must be backordered, or if the title is not available from Ingram. The resulting report has been updated to include a total number of units available for immediate shipment from both the primary and secondary warehouses.

Price This List Feature

Total Products in List:	10
Total Units in List:	10
Total Retail Price*:	\$252.77

☒ Stock Availability
 ☒ Price this List

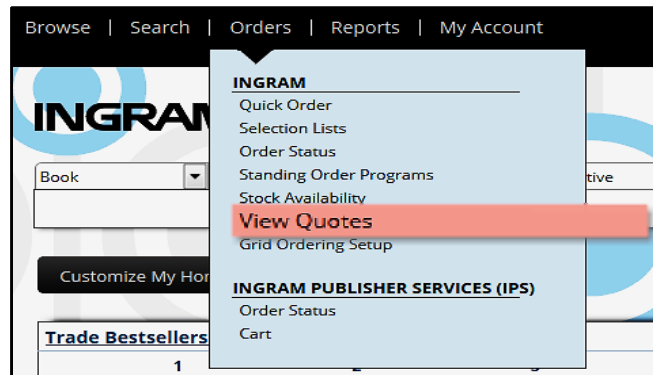
☒ iMatch this List
 ☒ Set DNE Priorities

INGRAM.

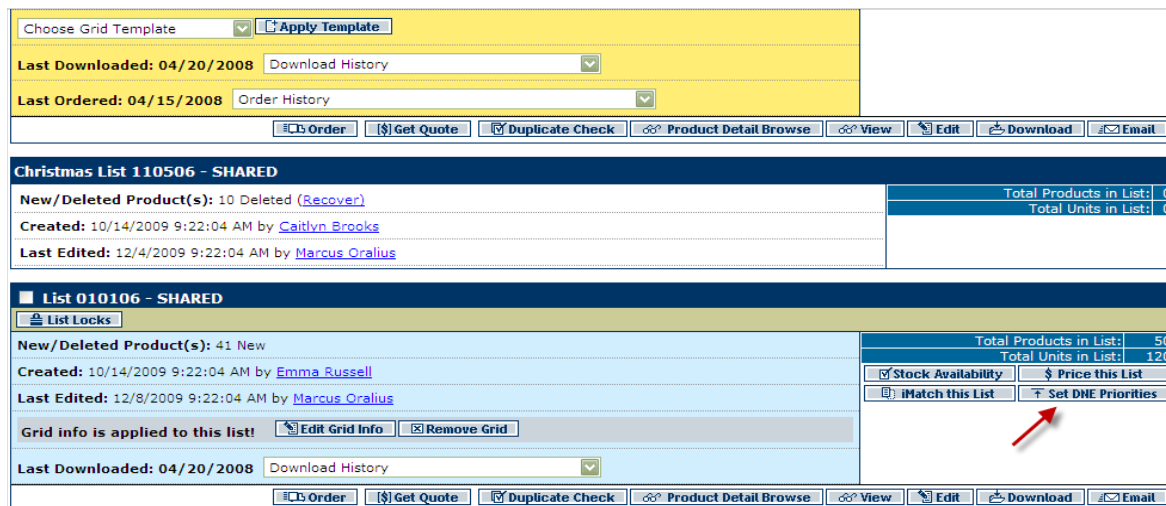
ipage subscribers can set up a selection list of titles and then request a price quotation for that list using the *Get Quote* function. Utilizing the *Get Quote* function will also keep the current title pricing firm for up to 60 days, if the quoted order is then placed through ipage.



ipage will display the quote within the *Order* section under a function labeled *View Quotes*.



From the *View Quotes* area, all ipage users on an account can review existing quotes and print the quote. Those users who have ordering capability on ipage can delete the quote if desired or release it as an order. Quotes are valid for 60 days. To revise a list (including changing quantities) and request that it be re-quoted, simply return to the *Selection List* function, edit the list they want quoted, and resubmit it for quotation.



7. Ingram does not charge for our online title selection, ordering and account management tool but provides access to this database as a free service to the Library Department.

8. The Jefferson Parish Library Department currently subscribes to ipage which is provided at no charge. Ingram is also offering free full-text reviews at no cost to the Library Department. (\$350 savings).

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 robust array of publicity and product news sources. Here are just a few ipage features:

- ❖ 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.
- ❖ 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
- ❖ 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 search
- ❖ Boolean search
- ❖ Saved search
- ❖ Access to search all titles in our Extended database
- ❖ Excerpts for selected titles
- ❖ Review Citations
- ❖ Full text reviews for selected journals for a nominal annual fee

The Library's ipage accounts are created so that an Administrator designated by the Library 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.

ipage is customer-driven, and **allows users to individually customize their ipage experience**. Users have even better tools to assist in prioritizing the critical information they need to search, order, and deliver more content to more patrons. ipage focuses on personalization and intuitive functionality. Customizable widgets allow users to design their own homepage with the tools they use most. Users can easily track bestsellers, access online catalogs, view custom lists, and bookmark favorite destinations in and outside of ipage.

Benefits of ipage home page include:

- A simplified menu structure that allows our customers to find what they are looking for faster.
- Roll-over drop-down menu options for each functional area of ipage that enable users to get to content with less effort.
- More suggestions from Ingram product experts in our Ingram Lists & Picks area on the Browse menu.
- More ability to customize the homepage, including the ability to remove widgets and the ability to choose a background theme.
- Enhanced Simple Search options, including the ability to search across multiple product types.

Reviews on ipage

ipage includes review citations and full text reviews from:

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

Descriptions, Reviews, Etc.

Publishers Weekly (04/28/2014): Bestseller Cussler's electrifying 12th NUMA Files adventure (after 2013's "Zero Hour" also coauthored by Brown) takes Kurt Austin, director of special projects at the National Underwater Marine Agency, across the globe in search of Sienna Westgate, the long-lost love of his life, and the world's preeminent expert in cybersecurity. Pronounced dead after he family's yacht sank in the Indian Ocean, a revived Sienna may have surfaced in the shadows of the Iranian black market. Notorious smuggler Rene Acosta is eager to trade her talents to any number of foreign governments for a huge sum, but the nefarious Brevard clan is also vying for control over the brilliant Sienna. Trusty colleague Joe Zavala and Dirk Pitt, NUMA's director, provide assistance as Kurt uses a range of advanced technology in the hunt for the woman whose disappearance haunts him day and night. Cussler delivers all the usual twists and turns on the way to the explosive climax. Agent: Peter Lampack, Peter Lampack Agency. (May 27) Copyright 2014 Publishers Weekly Used with permission.

Kirkus Reviews (05/15/2014): Kurt Austin and his National Underwater Marine Agency team save the world yet again, this time from a criminal family that's been hijacking the innocent and taking hostages for four generations. Commandeered off the coast of South Africa by Gavin Brevard and a gang of criminals who'd booked passage with counterfeit currency, the SS Waratah vanished without a trace in 1909. A century later, the Brevard family is still at it. Brothers Sebastian, Egan and Laurent, along with their kid sister, Callista, have kidnapped Sienna Westgate and her two children and intend to sell her services to the highest bidder assuming they can recover her from Rene Acosta, their double-crossing former client. The Brevards' racket is much more high-end than sexual slavery; for Sienna, architect of the legendary Phalanx security software, is one of the most sought-after computer experts in the world. Nothing could stop their nefarious scheme save for the fact that Sienna is the one-time fiancée of Kurt Austin, who lost her to Internet billionaire Brian Westgate. Sienna and her kids were supposedly lost at sea when Westgate's yacht, Ethernet, sank, but mounting evidence shows that she's no more dead than the SS Waratah, which never sank at all. Kurt's initial encounter with fire-breathing Callista Brevard as they battle over Sienna, who's being held on Acosta's yacht, ends inconclusively. So Acosta packs Sienna off to Korean street criminal-turned-industrialist Than Rang, head of the Daeshan Group, and the action there's plenty of action-shifts from the African coast to the Korean peninsula, where Kurt, his buddy Joe Zavala and their NUMA stalwarts dodge everything the Brevards can throw at them as they struggle to free Sienna before the world's computer systems all go kablooe. Once more, Cussler and Brown (Zero Hour, 2013, etc.) paint with such broad strokes that Kurt's adventures aren't so much written as whitewashed. COPYRIGHT(2014) Kirkus Reviews. ALL RIGHTS RESERVED.

Biographical Note: Clive Cussler is the author of dozens of "New York Times" bestsellers, most recently "The Mayan Secrets," "Mirage," and "The Bootlegger." He lives in Arizona and Colorado. Graham Brown is the author of "Black Rain" and "Black Sun," and the coauthor, with Cussler, of "Devil's Gate," "The Storm," and "Zero Hour." A pilot and an attorney, he lives in Arizona.

Review Quotes:
Praise for the NUMA Files novels of Clive Cussler and Graham Brown

"Devil's Gate" is a breathtakingly suspenseful, wildly inventive, enjoyable thriller. Hard-core fans will snap it up." -Library Journal"

"Cussler and Brown deliver nonstop action in "Zero Hour". The most exciting NUMA Files novel in the series!" -Associated Press

Review Quotes:
Praise for "Ghost Ship"

"Electrifying...Cussler delivers all the usual twists and turns on the way to an explosive climax." -Publishers Weekly"

Praise for the NUMA Files novels of Clive Cussler and Graham Brown

"Devil's Gate" is a breathtakingly suspenseful, wildly inventive, enjoyable thriller. Hard-core fans will snap it up." -Library Journal"

"Cussler and Brown deliver nonstop action in "Zero Hour". The most exciting NUMA Files novel in the series!" -Associated Press

Review Citations:
• *Library Journal Prepub Alert* 12/01/2013 pg. 66 (EAN 9780399167317, Hardcover)
• *Publishers Weekly* 04/28/2014 (EAN 9780399167317, Hardcover)
• *Kirkus Reviews* 05/15/2014 (EAN 9780399167317, Hardcover)

Contributor Bio: [Cussler, Clive](#)
Clive Cussler is the author of numerous New York Times bestsellers. He splits his time between Telluride, Colorado and Paradise Valley, Arizona.

Contributor Bio: [Brown, Graham](#)
Graham Brown is the author of Black Rain, Black Sun and The Eden Prophecy. Since 2010 he's been lucky enough to work with Clive Cussler on the NUMA FILES: Devil's Gate, The Storm and Zero Hour were all NYT bestsellers. His latest project is a supernatural thriller entitled Shadows of the Midnight Sun, co-written with Spencer J. Andrews. Spencer J. Andrews is a screenwriter and independent filmmaker. Shadows of the Midnight Sun is his first novel. And the first in the Shadows Trilogy. -

9. ipage selection lists, similar to the shopping cart functionality found in other Internet sites, are among the most versatile features on ipage. They're the starting points for using ipage for ordering. Once you create a list, you may add products, delete products, move products to other selection lists, or send it as an online order.

Ordering online using our selection list functionality enables the Library to create multiple title lists. These can be downloaded in a variety of formats such as BISAC, FlashBack®, or brief MARC order records for **import into your ordering or library automation system**. ipage selection list downloads are compatible with the SirsiDynix Symphony system.

Ingram supports EDI Transaction types and formats based on the capabilities of the library automation system. Ingram EDI offerings include:

- Electronic ordering using the X12 format and FTP for communications.
- Enriched EDI ordering.
- Text format full order confirmation via email from Ingram email to user-specified email address.

EDIFACT Order, Order Response and Invoice

- Purchase orders are created in acquisitions and sent to Ingram via FTP.
- Ingram processes the 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 greatly reduce the amount of effort used in the manual posting of invoices. Ingram continues to provide paper invoices to e-invoice users.

Enriched Edifact Order

This enhanced order transaction allows users to send additional distribution information in the EDI order record that provides Ingram with all the information necessary to create complete holdings records to match the items shipped. The holdings records are loaded with MARC bibliographic records and overlay the on-order items. When the materials arrive from Ingram, they are shelf and circulating ready. Also with Enriched EDI we offer the ability to drop ship to branches as well as simplify account management through ordering on a single account and having Ingram separate orders based upon the enriched data that allows us to process orders per the library's specifications and route them to the correct branch.

10. Ingram's ipage features an option called Custom MARC. Custom MARC gives libraries the ability to create and map a custom MARC record profile for downloading brief order records for loading to their Integrated Library System (ILS).

Libraries can use grids to allocate multiple copies of an item across their funds, locations, etc. The grid features are an addition to the Custom MARC functionality, with the Custom MARC mapped fields and values feeding the grid.

Once Custom MARC data has been added to an account by the administrator, a user can create a grid template, selecting which Custom MARC mapped data elements to use. After a template is created, it can be applied to an entire selection list or at a line item level within a list. As a template is applied, quantities for each item are increased as necessary and individual allocations are made across the

library's funds and 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.

MARC Setup

Add Data Mapping

Your selected acquisitions vendor, III Enhanced, has unique requirements for the format of their MARC records. The fields below have been automatically mapped based on your selection of this vendor. Use the Add/Edit Values button to build a list of your library's Locations and Funds. Enter values for these fields exactly as they appear in your acquisition system.

If desired, you can map additional data elements and values into your MARC download using the fields below.

Tag #: Subfield: Data Element:

Data Mapping			
Tag #	Subfield	Data Element	Action
001		Ingram Control Number	
008		File Created Date	
010	a	Library of Congress Control Number (LCCN)	
020	a	ISBN/EAN (depending on your MARC download format)	
020	c	Price	
024	a	Universal Product Code	
024	d	Universal Product Code (Additional digits)	
035	a	Alternate Control Number	
082	a	Dewey	
100	a	Author	
245	a	Title	
260	b	Publisher	
260	c	Pub Date	
960	o	Copies (Total Quantity)	
960	t	Location	<input type="button" value="Add/Edit Values"/>
960	t	Copies (Location Quantity)	
960	u	Fund	<input type="button" value="Add/Edit Values"/>
960	u	Copies (Fund Quantity)	
			<input type="button" value="Complete"/>

9XX

The Custom MARC feature allows the user to create a list in ipage, and then add local data (like fund, location, collection code, requestor, etc.) in 9xx tags and subfields per the 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 the Library's ILS system.

Grid Summary

We have a Grid Summary option available for our Library customers who use grids. Users are able to select two of their Custom MARC (9XX) tags as fields used to sum a "gridded" selection list. After the ipage administrator selects which 9XX tags they want as part of their grid summaries, the Grid Summary button will appear for selection lists that have a grid attached, and when the button is clicked from the List of Lists page, the View Selection List page, or the Edit Selection list page, the user is taken to a page containing quantity, extended list price, and customer discount price totals by the Grid Data elements associated with that selection list.

Grid Summary					
Turn Search Options OFF					
Grid Summary for Selection List - Lisa Test 040115					
Sum by: Location - Fund					
Created By: Lisa Johnson					
List Type: Private List					
Last Updated: 05/22/2015 10:50:40 AM					
				Selection List Totals	
				Number of Titles:	6
				Total Quantity of Units:	18
				Extended List Price of all items in Selection List:	\$344.22
				Extended Discounted Price of all items in Selection List:	\$206.52
Sum By Totals					
Location	Fund	Titles	Quantity	Extended List Price	Extended Disc. Price
buf	abfr	6	6	\$114.74	\$68.84
buf Totals		6	6	\$114.74	\$68.84
cen	abfr	6	6	\$114.74	\$68.84
cen Totals		6	6	\$114.74	\$137.68
chl	abfr	6	6	\$114.74	\$68.84
chl Totals		6	6	\$114.74	\$206.52
Selection List Totals		6	18	\$344.22	\$206.52

11. For orders placed via SirsiDynix, Ingram sends full order acknowledgements in text format via email to user-specified email address. The 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 sent within two to four hours of order placement. Most acknowledgments fall within the two-hour window.

ipage provides immediate order confirmation, which can be printed. The ipage order confirmation includes titles that have shipped, as well as backordered titles. The order confirmation gives a detailed summary of the order, including title, author, EAN, whether the item is shipped or backordered, discount, and retail price.

Confirmation Summary for Purchase Order: 3000183214

Download

Print Version

Status	Products Ordered	Units Ordered	Units Shipped	Units Backordered
STOCKED & SHIPPED:	263	263	263	0
OUT OF STOCK, B/O:	16	16	0	16
GREENLIGHT, STOCKED & SHIPPED:	23	23	23	0
Totals:	302	302	286	16

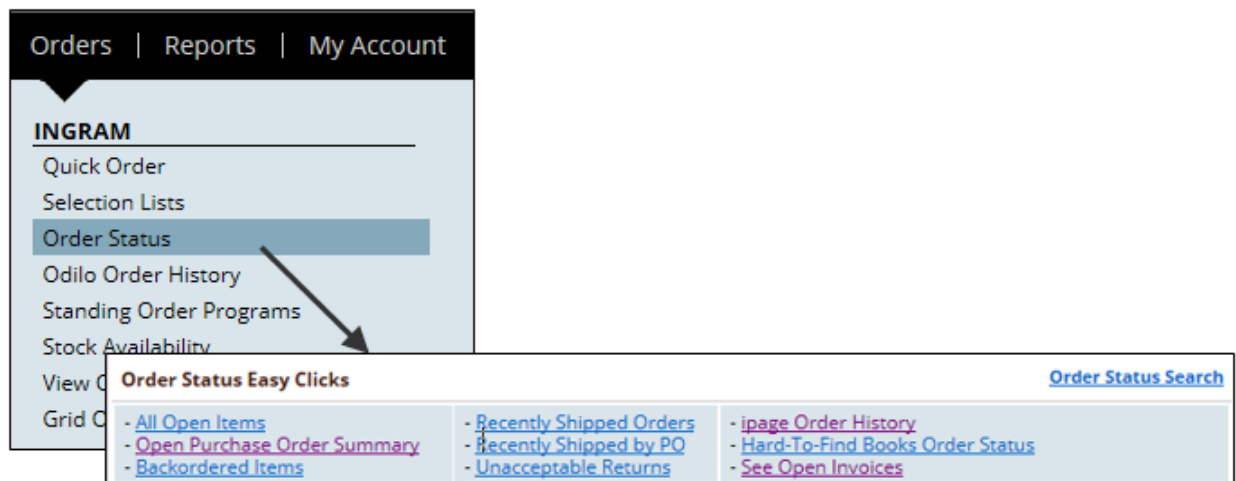
Confirmation Detail for Purchase Order: 3000183214

Ship To Account:	20
Order Method:	
Customer PO or Reference Number:	3000183214
Warehouse:	LAVERGNE, TN
Backorder:	Use my Order Default - (Hold/Release: Hold)
Do Not Exceed Amount:	\$2,862.00
Shipping Instructions:	Default Ingram Shipping Instructions
Total Items:	302
Total Units:	302
Extended List Price:	3,885.97
Order Date:	Wed Apr 14 14:01:00 CDT 2010
Ordered By:	
ECU:	GYSPZ
Warehouse Pairs:	N

STOCKED & SHIPPED

Product Name	EAN Product Code	Contributor	Order	Ship	BO	Disc. %	Line Level PO	US SRP
Abraham Lincoln, Vampire Hunter	9780446563086	Grahame-Smith, Seth	1	1	0		N/A	21.99
Adoration of Jenna Fox	9780805076684	Pearson, Mary E.	1	1	0		N/A	16.95
Air Gear Volume 1	9780345492784	Oh! great	1	1	0		N/A	10.95
Air Gear, Volume 10	9780345508133	Oh!great	1	1	0		N/A	10.95
Air Gear, Volume 11	9780345508140	Oh!great	1	1	0		N/A	10.99

Order Status information is available on ipage. Under the Order drop down menu, simply click Order Status for a listing of Order Easy Clicks:



- **All Open Items** - This report shows the line items that are currently backordered or being processed and therefore have not yet been invoiced.
- **Open Purchase Order Summary** - This report 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** - This report includes the 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** - This report 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. Order details can be viewed by clicking the order entry number, and delivery status can be viewed by clicking the shipping tracking number.
- **Recently Shipped by PO** - like the Recently Shipped Orders, this report shows orders shipped within the last 14 or 90 days. It is sorted by PO Number and includes the date shipped, order entry number, and shipping tracking number. Order details can be viewed by clicking the order entry number, and delivery status can be viewed by clicking the shipping tracking number.
- **Unacceptable Returns** - This report shows returns sent that were outside of Ingram's return policies.
- **ipage Order History** - This feature 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** - This report 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 will only show up for 90 days, UNLESS the Purchase Order is still open, e.g. there are still titles on backorder or in processing. Then you may be able to search for older invoiced items.

Processing

12-22. Ingram understands your processing specifications, and confirms we can meet these requirements. Our expertly-trained processing team provides the ultimate in flexibility with more than 100 different components and unlimited customized options for books, audiobooks, DVDs, and music CDs. All processing is done in accordance with the Library's specifications, and quality control measures are in place to ensure that Library expectations are met.

Processing options include, but are not limited to:

- AR/SRC Label
- Barcode
- Branch Label
- Date Due Slip
- Genre Label
- Label Protector
- Laminated Paperback Cover
- MARC Record
- Mylar Jacket
- Pocket
- Preprogrammed RFID/Barcode Set
- Property Stamp
- RFID Tag
- Spine Label
- Spine/Pocket Label
- Spine Tape
- Audiovisual Cases
- Theft

To add processing and cataloging services, Ingram offers online enrollment through our OnBoarding portal. Michael Bush, Manager, Client Integration, is available to guide the Library through the portal and to answer any questions throughout the process to ensure consistency of book appearance. Included in the OnBoarding portal are questions related to both physical processing and/or MARC record needs for both books and A/V materials. Included details are physical processing rules such as label location, taping requirements, and jacketing needs. Adult and Juvenile materials can have different processing profiles if the Library prefers. We can further refine the Library's profiles based on binding of book. Using the Library's OnBoarding portal responses, our team will create a BookMARC profile for any account requiring certain kinds of labels, e.g. spine labels, or full cataloging records. Cataloging profiles can be refined by type - fiction or non-fiction - by collection - Adult, Young Adult, Juvenile, and Easy - and by genre - Graphic Novel, Fantasy, etc. - to ensure that the Library's materials are all cataloged in accordance with what is already in the Library's ILS system.

Processing and/or cataloging is profiled on an account level, and any item ordered on an individual account will receive the appropriate processing services. We are able to change your account profile upon written notification.

Ingram will be pleased to establish the necessary accounts to accommodate all shipping locations and whether processed or unprocessed books are ordered.

Cataloging

23. Ingram provides access to full-level MARC records through BookMARC, the proprietary Ingram cataloging database. BookMARC includes the complete LC MARC database, as well as tens of thousands of entries created by Ingram's MLS-degreed catalogers.

Ingram is a trading partner with OCLC, wherein our CIP upgrades and MARC record originals are accepted by OCLC for inclusion in WorldCat.

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, Sears List of Subject Headings, and Library of Congress Subject Headings. Ingram cataloging is consistent with LC rule interpretations and cataloging practices.

Ingram Catalogers are experienced in working with Library Technical Services and Cataloging staff to ensure that the cataloging services we perform accurately reflect the library's local standards and conventions. With Ingram, your project will be given top priority by our cataloging staff. A team of professional MLS-degreed catalogers and professionals experienced in working with SirsiDynix will be assigned to your project.

Ingram Library Services will send and receive samples at the beginning of the project, plus continue discussion via conference calls and email between Ingram Cataloging specialists and library staff throughout the projects to assure compliance with specifications.

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.
- CIP, OCLC, or other Level 5/7 records can be brought up to FULL AACR2 / RDA / MARC 21 standards to correspond with book in hand by an MLS-degreed cataloger.
- Where existing or derived records are not available, an original cataloging record can be created with book in hand by an MLS-degreed cataloger.
- Should the Library require OCLC Holdings Updates, Ingram can provide this service at no charge, utilizing OCLC Batch Load Services. Please note that OCLC charges a one-time project set-up fee, which will be the responsibility of the Library.

In addition to standard MARC records, Ingram's MLS-degreed catalogers can review and update records to meet local practice requirements. Examples include applying local exceptions to LC or Dewey classification; adding contents, summary, target audience, or local notes; and applying local subject headings or local exceptions to standard subject headings lists.

Pricing for these customized services can be provided upon receipt of the Library's technical services specifications and will be reflective of the complexity of the Library's requirements.

Quality Control – Processing and Cataloging

Ingram allows for test orders at the beginning of the project. 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. This process continues until the Audit Team notifies Ingram Technical Services department leadership of the absence of all processing or cataloging errors. At that point, the project is removed from 100% audit. We can return a project to 100% audit for a specified period of time, should the need arise at any point in the project. All Library Technical Services associates routinely have two orders audited each week. New associates are 100% audited for their first 60 days.

Ingram's standards and quality control measures help to ensure that cataloging errors are rare. However, we understand every library's desire to maintain a database with only records accurate to your specifications. In the event an Ingram record is received by the Library that does not meet your specifications, Ingram will offer the Library credit for the cost of the record, or offer to correct the error at no additional charge, whichever is most convenient for the Library. We will work with the Library at the beginning of the project to clearly define what constitutes an error and during the project to remedy reported errors quickly and accurately.

24. Enriched EDIFACT Order users can send additional item-specified information like branch code, fund code and quantity along with each order line. This information can be returned in Ingram's BookMARC™ records to update holdings and/or overlay on-order records in the catalog.

25 -26. Ingram's Custom Cataloging profile provides several options to the Library, including original records. Classification and cuttering scheme for individual categories are also part of the profile. The profile is refined by Adult, Young Adult, Juvenile, and Easy materials. Within each of those four categories classification and cuttering are further refined in areas of fiction, non-fiction, biographies (individual and collective), reference, and audiovisual materials. Genre headings and special collections are also included in the cataloging profile.

Ingram customizes cataloging to the needs of the Library through a customer profile. The Cataloging and Processing Profile allows the Library to create a unique local call number and cuttering including additional classification symbols to indicate Juvenile, Fiction, etc., within the BookMARC system parameters.

Delivery and Shipping

27. When requested by a customer, and if the carrier's operating conditions permit, the carrier may perform inside delivery. Please note that the carrier's only obligation is to get the freight inside the door or onto a dock. It is the Library's responsibility to transfer the material to other desired destinations. If inside delivery is desired, the Library must specify this when establishing/updating their account(s). Where inside delivery is not provided, the carrier's only obligation is to move the freight to the back of the truck. Inside delivery will be clearly designated on the shipper's bill of lading but not on the Ingram shipping label.

28. In-stock, non-processed and non-cataloged book orders are shipped 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 will 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.

Fill Rate

Ingram's senior and executive leadership constantly monitor fill rate reports across all market segments. Ingram Library Services is proud to state initial fill rates are usually 85-90%, with a fill rate of 95 to 100% shipped or reported within 90 days, on items in Ingram's database. Fill rates for certain specific libraries are monitored periodically and we have programming in place to accurately calculate fill rate for any customer upon request. Note that our fill rate includes over 16,000,000 available titles.

Specific Numbers for Print

91.78 % shipped at time of initial order

98.92 % shipped in 60 days

99.02 % shipped in 90 days

Ingram's average fulfillment rates listed above are for in-print library material. Fill rates were calculated for Ingram public library customers for items available through Ingram at the time of order, excluding items not yet available or not currently available from the publisher.

29. Ingram delivers library materials according to our on-hand inventory at the time your order is placed and ongoing orders will receive immediate release status.

Ingram normally ships items via UPS ground transportation. Shipping will be via best method as determined by Ingram, which may include order or account consolidation, shipping schedules or other account setting adjustments to maintain freight costs below 2% of invoice.. Ingram does not currently assess any additional fees for shipping. However, given the unpredictable impact of rising oil prices, Ingram reserves the right to assess a fuel surcharge with notice.

30. Ingram can provide multiple copies of invoices, and they can be mailed, e-mailed, or included with the shipment.

Title data on invoices is listed in the following order: (1) quantity ordered and shipped, (2) author, (3) title, (4) publisher, (5) ISBN/EAN, (6) unit list price, (7) discount, (8) unit net price, and (9) extended price. Items on invoices are listed alphabetically by either the author or the title per the Library's request.

All invoices have an invoice number and date, order entry number, and Ingram's Federal ID number. Library name, ship to and billing account addresses and numbers, and purchase order number (can be up to 22 characters in length) are all listed on the invoice. Order data includes shipping warehouse and location, carrier, ship date, number of cartons, and total weight of order.

Also included on the invoice is a code for each binding type. If a title is a Library Binding, it may be designated as such by the notation LIB after the title.

Ingram can invoice for cataloging and processing on the same invoice as materials or on a separate invoice, per request of the Library. Processing and cataloging charges appear as separate line items

when billed on the same invoice as materials. Processing and cataloging are invoiced as accumulated charges, not individual line items per each title.

“Invoice in the Box”

Ingram has the option available to libraries to have their invoice put inside the box of shipped items. This invoice is in a modified, easy to read format. With "Invoice in the Box", libraries can check in items against the invoice and do not have to wait for the invoice to arrive in the mail. The library still has the option to have multiple copies of the invoice. Please note that if invoices are included with the shipment, they cannot be mailed separately.

31. 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 the entire quantity is received from the publisher. Please note that this profile option may lessen initial fill rate of an order. As Ingram is offering shipments from two distribution centers, we suggest allowing fulfillment from both, which would result in two shipments and two invoices. For example, if a library orders 20 copies of a title, if we had 5 in stock in the Library's primary distribution center and 15 in stock in the designated secondary distribution center, we could fill the entire order but it would be delivered in two shipments. We are happy to discuss with the Library to determine the best option to meet your workflows.

Completed orders are sent to packing. Here they are boxed with packing paper or air pillows to prevent damage. Orders are then sent to shipping via conveyor belt where they are weighed, labeled, and sent out with various carriers.

In preparing books for shipment, our standard procedure is to stack the books on a cardboard base as a tight cube shape. The books are then wrapped in plastic and placed in a high test-weight box. Ingram is known for using the best boxes in the industry with the highest test weights. Paper and/or air pillows as dunnage are placed as needed in the carton before the box is closed and sealed. The shipping cartons Ingram uses have the highest recycled content allowed to maintain burst strength.

32. After receiving an order, Ingram will ship all titles currently in stock. Any remaining titles normally available through Ingram will then be placed on backorder for a period of time specified by you. At the end of the backorder period, all unfilled titles will automatically cancel, except for titles Not Yet Received from the publisher.

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, and if it has not been filled by that date, Ingram cancels the order. For titles not yet published, the Library has a choice to either have these items cancel at the end of the account's established backorder period, or for the backorder clock to start only after the titles is first received by Ingram. The first option may result in a lower fill rate.

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

The Title Status Report is sent to customers monthly. This report will provide you with current backorder status information as well as indicate which titles could not be supplied within your normal

backorder period. Listed below are the most frequently used stock abbreviations that will appear on the Title Status Report:

B/O = Out of stock at this time and on backorder for you
NLS = Title is no longer stocked by Ingram
NYR = Title is not yet received by Ingram into the distribution center
OSI = Out of stock indefinitely by the publisher
PPD = Title has been postponed by the publisher
OP = Title is now out of print at the publisher
CANC = Title has been cancelled at this time by the publisher



TITLE STATUS REPORT

Anywhere Library
123 Your Street
Happy Town, TN 12345

Date 02/01/2019 ****
Page 1

BILLTO/SHIPTO 20v1234 / 20u5678

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	Whse Location	Status	Cancel Date
THE FOLLOWING ITEMS HAVE BEEN CANCELLED:											
1	BRAVE LEARNER	ROBERT JULIE	0143133225	PITMAN	ING181018-LF-1	ING181018-LF-1	17.00	TPAP	IN	NYR	01/21/2019
1	DARKEN DEVOLVES	BIRNE MICHAEL J	0042842617	HARPER C	ING181018-LF-1	ING181018-LF-1	28.99	HARD	IN	NYR	01/21/2019
1	LIQUID RULES	MCDONNELL MARK	0944850194	HOSGTON	ING181018-LF-1	ING181018-LF-1	26.00	HARD	IN	NYR	01/21/2019
1	RED STAR OVER THE PACIFIC 2ND	YOSHIMURA TOSHI	1682672183	U S NAVY	ING181018-LF-1	ING181018-LF-1	36.95	HARD	IN	NYR	01/21/2019
THE FOLLOWING ITEMS WILL REMAIN ON BACKORDER UNTIL CANCELLATION DATE:											
1	LEGEND OF ZELDA BREATH OF THE	PIGGYBACK	1911015486	SIMON DT	ING181204-LM-1	ING181204-LM-1	39.99	HARD	IN	OS	03/12/2019
1	I THINK YOURS WRONG (BUT IN I)	HOLLAND SARAH S	1400208416	THOMAS N	ING181228-SE-1	ING181228-SE-1	24.99	HARD	IN	NYR	
1	PAULA DEENS AIR FRYER COOK	DEEN PAULA H	1943016070	PAULA DE	ING190110-LM-1	ING190110-LM-1	24.95	HARD	IN	BO	04/15/2019
1	WELDING COMP 2ND /E REV/E 2/E	REISER MICHAEL	199186691X	MOTORBO	ING190110-LM-1	ING190110-LM-1	30.00	HARD	IN	BO	04/15/2019
1	WHAT TO EAT WHEN	ROLIER MICHAEL	1426220111	NATL GEO	ING190110-LM-1	ING190110-LM-1	28.00	HARD	IN	BO	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 OE60 screen
IR - In research
MAI - 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

33. Ingram's Returns Policies provide for prompt and efficient resolution for reporting and returning materials that are received damaged, defective, or shipped in error.

- Ingram Customer Service associates are happy to assist with issues including shortages, damages, or defects, and to provide returns authorizations as required.
- Customer Service hours of operation are Monday through Friday, 7:00 a.m. – 7:00 p.m. (Central Time.)
- Through ipage, the Library may create Hassle-Free returns, report shortages, track status of a return, and view credit memos. ipage is available 24 hours a day, 7 days a week.

Unprocessed Print Material

Any unprocessed book ordered in good faith that is found to be damaged or unsuitable, whether it is due to Ingram's error or the Library's error, may be returned under the Hassle Free Returns Policy.

- Unprocessed materials may be returned up to **60 days** after the invoice date.
- A copy of the Hassle-Free Returns form (the back of your packing slip or printed from ipage) should be included in each carton shipped to Ingram.
- **A return authorization number is not required for unprocessed print material.**
- Ingram will not charge a restocking fee for items returned in accordance with our Hassle Free Returns Policy.

Product with Defects

Ingram understands that defects inside a book may not be detected until it has circulated, so there is **no timeframe for returning product with publisher defects**, including the following:

- Missing pages
- Contents out of sequence
- Book bound upside down
- Contents different than the cover/title
- Ink or printing issues
- Crooked pages
- Blank pages
- Disc does not play
- Item is received with missing or incorrect disc(s)

Please note that due to the wear and tear caused by circulation, we will only accept defective books where the binding is falling apart up to 60 days after the invoice date.

Processed Materials

Items that have received cataloging or processing per the Library's specifications are no longer in resalable condition, and therefore can only be returned due to an Ingram error or if defective or damaged.

- The Library is asked to report any cataloging and processing errors as soon as they are noticed, so that Ingram can research and resolve the issue in a timely manner.
- Processed material returns require return authorization from our Customer Care Department. To request authorization, please call **(800) 937-5300 Ext.27665**

Audiovisual Materials

Unprocessed audiovisual materials that are damaged, defective, or shipped due to Ingram error may be returned up to **60 days** after the invoice date.

- Audiovisual returns require return authorization from our Customer Care Department. To report defective or damaged product and request authorization, please call **(800) 937-5300 Ext.27665**.
- Playaway® accepts return of defective products within one year of the invoice date. The Library should contact Playaway directly.

Ingram will issue a credit for audiovisual titles received damaged or defective, including damage or defects to individual discs in a multi-disc set. If the title is currently in stock, we also offer the option to replace the entire product, rather than just 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 once 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 have a guarantee of free disc and vinyl case replacements. Publisher contact information for every title is easily obtained on ipage at the Library's convenience, 24/7.

Non-Returnable Materials

Each publisher decides if their product is non-returnable. This may be on a product-by-product or binding-by-binding basis, or as items go out of print. Therefore, Ingram does not assign a non-returnable status to a publisher.

- Non-returnable items are indicated as such on ipage.
- Ingram cannot accept return of any product that we do not stock or items that were not originally purchased from Ingram.

Items Damaged in Shipping

For materials damaged in transit, the Library is asked to always accept delivery of materials. Damage should be noted on the carrier delivery receipt, and the Library should call our Customer Care Department for instructions on making a return.

Overstock Returns

Return of unprocessed materials sent after the 60-day window will be handled as Overstock Returns.

- Overstock returns for libraries may not exceed 10% of purchases made during the preceding 12 months.
- Overstock returns will have a 10% restocking fee applied.
- All product returned to Ingram must be in a condition that it could be resold. Therefore, we cannot accept return of processed items as overstock returns.
- Ingram reserves the right to send back, at the Library's expense, all products returned to us that is not in resalable condition.

Hard to Find Books Alibris Returns Policy

If the Library is 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 only if the condition of the book is not as described on ipage.

Credit Memo

Upon proper notification and receipt of the returned titles in our distribution center (if required by Ingram), the Library will be credited for the full invoiced amount for the item(s.) A credit memo can be emailed listing the item(s), dollar amount, and purchase order number credited. Credits will also be reflected on the monthly statement with reference to the purchase order number.

Additional terms for credits for items with an Ingram error or that were received damaged or defective:

- Customer Care will advise the Library whether the physical product should be disposed of or returned to Ingram.
- If Ingram requires the Library to return product to our distribution center, a Call Tag will be issued to cover the freight charges for the return.
- If the Library was invoiced for freight on the original order, we will also credit freight charges, calculated at the standard UPS rate for the weight of the items returned.
- The Library is responsible for shipping and carrying charges for returned items that are not damaged, defective or shipped with Ingram error.

No Charge Replacement

As an alternate to a credit for an item that is damaged, defective, or shipped with Ingram error, libraries may call our Customer Care Department to request a No Charge Replacement (NCR)

- If a replacement title is in stock, the Customer Care Representative will either email or fax a No Charge Replacement Return Authorization form to your library.
- The Library must mail this form along with the returned item and the original packing slip for a replacement copy.
- If the Library requests a No Charge Replacement but the title is temporarily out of stock at the Library's assigned distribution centers or requires backorder, Ingram will suggest the Library receive a credit rather than an NCR and reorder the title.
- Important: For Libraries that provide enriched data as part of their orders, e.g. data that guides cataloging and processing, Ingram will issue a credit. The Library would be responsible for submitting the reorder via whatever method was used for placing the original order, such as EDI or ipage grids.

Claims

Please notify Ingram if you have not received an anticipated publication or if an order is short shipped. If an order is shipped but not delivered, claims will be directed to Customer Care to ensure tracking and credit or replacements are handled as quickly as possible. Anticipated publications may have a delayed release; if so, it will be reflected on ipage.

Cancellations

Ingram can currently accept cancellations through phone, mail or fax request. The Library can also cancel individual open line items through ipage. If an entire purchase order is open and no line items have been filled, the Library may request that Customer Care cancel the purchase order in its entirety rather than the Library cancelling each title individually. This will be done at no charge to the Library.

Returns Reporting

ipage features the following returns reporting options. You can:

- Report shortages.
- Determine the date your return was received.

- See whether a return is in process.
- View credit memo information.

Returns Status Results

Product Sales		Total Overstock Returns (13 month)	Current Return Percentage as of 04/22/2010
MTD	Last 12 Months		
14,145.06	193,421.12	0.00	0.00

Returns Status For Items at Ingram

Ingram Ref.No	Date Received	Customer Ref. No	Cartons Received	Return Type	Status	Credit Memo No.	Date Credited	Units Credited	Amount Credited
03854237	04/08/2010	04/08/10	1	HASSLEFREE	In Process			0	0.00
00906269	04/02/2010	50465959	0	HASSLEFREE	Credited	50639457 50639457	04/02/2010	1	21.89

34. All invoices, credit memorandums and shipping labels reference individual purchase order numbers. Purchase Order numbers can be up to twenty-two (22) digits in length. If the purchase order number issued by the ordering agency exceeds 22 characters in length, please indicate which characters are to be used on the orders.

Invoices include the following information: (1) shipping address, (2) billing address, (3) account number(s) (4) OE number, (5) quantity, (6) author, (7) title, (8) publisher/studio, (9) ISBN/EAN, (10) unit list price, (11) contractual discount, (12) unit net price, (13) total price, (14) purchase order number, (15) FEIN, and (16) processing charges. Items on invoices are listed alphabetically by either the author or the title per the Library's request.

Ingram can invoice for cataloging and processing on the same invoice as the product or on a separate invoice. Processing charges appear as the last line items when billed together with product. Please note that processing will be an accumulated charge, not an individual line item per title.

35. Orders will ship with Ingram-paid freight from your primary and secondary distribution centers. Items receiving processing and cataloging services may ship from a single distribution center exclusively. **Ingram does not assess any additional fees for stated freight terms.**

Ingram's unique distribution center pairing gives our customers access to our entire inventory via convenient, regional locations. When an order is placed, titles are initially checked against the primary distribution center. Titles not in stock at the primary facility are then instantly checked at the secondary distribution center. This ensures a very high first fill rate. Titles not available in stock are then backordered from the publishers. Through your designated distribution centers, Library Department will have access to Ingram's entire expanded inventory of over 14 million titles.

Your primary distribution center is located in La Vergne, Tennessee and your secondary distribution center is located in Fort Wayne, Indiana. The La Vergne facility is one of our largest, covers more than 461,791 square feet and will allow Ingram to maintain our superior standards for high fill rate and rapid delivery to the Library. Distribution center designation is subject to change by Ingram to provide the best service.

Discounts/Pricing

36. All pricing includes shipping cost. List prices of individual library materials are set by the publishers/manufacturers and not by Ingram as distributor. Therefore, we cannot guarantee that the retail/list price of an item will not change. Discount is taken on the individual title, and not on the total

order. We consider ipage to be our online catalog and print catalog prices should be checked against ipage for the current price at time of order.

With Ingram, these contract discounts also apply to our Standing Order and Continuations Program.

Ingram has completed the sheets indicating our percentage discount for each category bid. Book product is discounted off of publisher's current suggested list price. Net titles receive a 0% discount.

Please note that processing prices are based on use of Ingram standard processing supplies. Any non-standard supplies would need to be provided by the Library. Any additional processing options chosen by the Library will receive the current pricing in place at the time each option is added to their profile.

Any processing components not specifically quoted in this RFP can be added to your profile at the current standard pricing.

In determining which titles receive less than full trade discounts, Ingram has utilized its best efforts to categorize books for pricing purposes by considering the binding, cost of acquisition, general marketing categories, publisher's discount, and other factors. Ingram reserves the right to be the sole and final determinant of the pricing category.

In drafting a contract, Ingram bases pricing and discount offering upon several factors including dollar value of commitment, actual expenditure, number of accounts and shipping locations. In determining which titles receive less than full trade discounts, Ingram has utilized its best efforts to categorize books for pricing purposes by considering the binding, cost of acquisition, general marketing categories, publisher's discount and other factors. Ingram reserves the right to be the sole and final determinant of the pricing category for this Contract.

Ingram cannot issue credits for accounts failing to follow the proper notification and account set up procedures.

Any item ordered prior to the contract start date will not receive the discounts offered herein. This includes both standing orders and previous backorders.

Jefferson Parish Library Department may currently be purchasing library materials from Ingram under a separate pricing agreement or contract. Upon award of this contract, the Parish may choose to purchase under their current agreement, or under the new contract. They will not be able to purchase under both contracts.

2.2 Period of Agreement

This contract will be for a period of three (3) years and will commence within 48 hours upon receipt of written notification of award. Discount will remain firm for duration of the contract period. The discounts and terms reflected in this response are offered only to the Jefferson Parish Library Department. They are not extended to schools or other government agencies.

Ingram acknowledges that this contract is eligible for two (2) renewal options. All renewals are contingent upon satisfactory services and contractual obligations being provided by the Parish and Ingram. Notification of extension should be received within 90 days of contract expiration, if possible.

Ingram's entire bid response, including all attachments, will be considered part of the resultant contract and/or purchase order and is to be incorporated by reference to this agreement between the parties with respect to its subject. This contract shall not be modified, altered nor amended in any way except by written notification per an Addendum.

2.3 Cost Proposal (Price Schedule)

Ingram strives to offer our customers the best discounts. Ingram has provided discounts and pricing under the Financial Proposal section of this response.

If Ingram is an awarded vendor, we will honor our entire discount schedule. Ingram discounts book product from the current **publishers' list price**.

2.4 Deliverables

In-stock, non-processed and non-cataloged book orders are shipped 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 will ship within 48 hours 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 Standing Order Programs require a backorder period, as titles are ordered 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 inventoried by Ingram that are temporarily not in stock, Ingram will attempt to place an order with the publishers within three (3) business days of receipt of order. Our ability to obtain out of stock titles is based upon 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.

Should the Library order books not currently stocked by Ingram, we will attempt to order the book if available on the open market through normal U.S. wholesale channels. Turnaround time will be dependent upon publisher availability, however, due to our long-standing relationships with publishers, we estimate one to three weeks on available items and sixty to ninety days on special order items not currently in stock at 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.

2.5 Location

Orders ship FOB Destination to the **East Bank Regional Library, 4747 W. Napoleon, Metairie, LA 70001**. Ingram defines FOB Destination as Ingram being responsible for the products until they are actually delivered to the Library. Once the items have been delivered, liability lies with the receiving agency.

2.6 Financial Profile - Not required for this RFP

2.7 Proposal Elements

2.7 (A) Technical

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.

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 the 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 a number of 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, including retailers, publishers, educators, and libraries. Those operating units are Ingram Book Group LLC including Ingram International and Spring Arbor Distributors®, Lightning Source LLC, VitalSource Technologies LLC, Ingram Library Services LLC, Ingram Publisher Services LLC, Tennessee Book Company LLC, and Verba Software Inc. All Ingram Content Group companies operate under a single mission of helping content reach its destination, and follow the same 5 values: to be Credible, Performance Driven, Agile, Innovative, and most importantly, 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.

Distribution Centers

Ingram Library Services enjoys the benefit of being part of one of the largest wholesale distributors of book-related product in the world, including physical book distribution and print on demand solutions. As such, we have established publisher relationships, inventory, and infrastructure in place to provide our customers with an unparalleled speed of delivery.

Ingram operates four regional distribution centers, totaling more than 1.7 million square feet and employing over 3,600 associates. We ship over 146,000,000 units across the nation annually. Having multiple distribution centers allows us to maintain the on-hand inventory required to meet fill rates, and to provide fast turn times - as little as 24 hours from order placement to delivery.



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

Name and address of firm:

Ingram Library Services LLC

Official Representative: Pamela R. Smith, Vice President and General Manager

One Ingram Blvd.

P.O. Box 3006

La Vergne, TN 37086-1986

Telephone No.: (800) 937-5300

Fax: 615-213-5196

Email: ilsbids@ingramcontent.com

Federal I.D. Number: 62-1746696

URL: <http://www.ingramcontent.com/pages/libraries.aspx>

ipage: www.ipage.ingramcontent.com

Ingram Library Services LLC is a Tennessee Corporation, owned wholly by Ingram Industries Inc. based in Nashville, Tennessee. Ingram Library Services operates as part of the Ingram Content Group.

Financial Strengthen and Stability

Ingram is a privately held, family-owned corporation operating under the same ownership since our inception. The Ingram family is actively involved in the daily operations of our company and has a vested interest in our customers' satisfaction. 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 in the industry. Our mission is to lead the industry in Customer Satisfaction and Distribution Services, while providing our associates with a challenging, growth oriented, secure working environment in which they may develop personally and professionally.

We have attached a report that provides information about Ingram's Financial Stability.

Implementation Overview

Jessica Short serves as Manager, Client Integration. In this role Jessica works closely with library customers to refine our integration/on-boarding process. Jessica will serve as the JPL **Project Manager**, leading the Ingram-JPL implementation team.

Under Jessica's guidance, Ingram suggests the following areas of focus for this implementation process:

➤ **On-Site Account Set-Up Review**

- Jessica will meet with the Library on-site to review and discuss the exact selection, acquisition, processing, cataloging, EDI requirements, invoicing and other procedures required by the Library.
- This will also be an opportunity to begin the process of establishing new accounts necessary for the purchase of materials from Ingram.
- Ingram specialists will be consulted as needed regarding the configuration or updating of any technical requirements.

➤ **Interface with Symphony**

- Included in this information-sharing and order-testing exercise will be Ingram's EDI team, who will be involved in setting up JPL accounts to allow you to submit orders and carry out other activities through electronic data interchange.
- Jessica will coordinate with the Ingram EDI team in this process, helping to ensure that all of your EDI requirements are set up correctly and run smoothly from the outset.

➤ **Collection Development Profiles**

- For selection support services, including standing orders and continuations, we would discuss any individual profile requirements for your accounts.
- An Ingram MLS-degreed Collection Development Librarian will lead this review process, as our Librarians are most familiar with our offerings and extensive capabilities.

With the broadest selection of content, outstanding collection development services, and shelf-ready options tailored to your Library; Ingram has the inventory and expertise to successfully partner with Jefferson Parish Library as your primary vendor.

2.7 (B) Qualifications and Experience

Customer Service Capabilities

It is our goal to provide customers with a source for person-to-person contact and to give the highest quality of customer service while maintaining appropriate service levels.

Our objective is to provide information and immediate response to customer concerns. Issues requiring research and resolutions are completed within 24-48 hours. We track specific errors and complaints as a service level measure.

Customer Care is based in our Tennessee headquarters, where representatives have immediate access to all Executive Staff for any service issues that require escalation and further research and discussion. By combining our Library Customer Care team under the overall Ingram Content umbrella, we are able to best utilize our systems, training and experience. From a Customer Service perspective, the team has a full support infrastructure, whereby other Customer Service Representatives within the team can cover for each other as required, i.e. during vacations.

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, 7:00 a.m. – 7:00 p.m. (Central Time.) Every attempt will be made to respond within 24 hours (during normal working hours) from phone call or receipt of correspondence. However, some issues may necessitate additional research in order to provide the best service and most complete response to the Library.

Ingram Contact List

The Library has toll-free telephone access to any Ingram point of contact. To reach Ingram Library Services dial **(800) 937-5300**. Your call will be answered by an automated voice system that will offer several prompts to assist you in reaching the correct department, or you may contact your Sales Representative directly at:

- Stephen Casey, Senior Sales Representative (214) 952-6310
Email: Stephen.Casey@ingramcontent.com
- Erin Eggert, Inside Sales Team Ext. 33139
Email: Erin.Eggert@ingramcontent.com
- Customer Care..... Press Option 1, then 1
Email: ILSCustomer.service@ingramcontent.com
To discuss concerns or issues regarding your account
- Account Services Ext.
Email: requirements@ingramcontent.com
To Set Up / Update an Account
- To Place an Order Press Option 1, then 2
- To Check Stock Status Press Option 1, then 4
- Toll-Free FAX Ordering 800-677-5116
- Credit Department 800-937-8100

Every attempt will be made to respond within 24 hours (during normal working hours) from phone call or receipt of correspondence. However, some issues may necessitate additional research in order to provide the best service and most complete response to the Library.

For any system issues like outages, login problems, Site Help etc., Customer System Technical Support is available 24 hours a day, 7 days a week. Please call (800) 937-7978. The Tech Support team can be notified via email at icstechsupport@ingramcontent.com.

Staff Qualifications

Ingram is a knowledge-based service company, and while we recognize that our investment in modern technology is of great value to our customers, the majority of the company's assets are vested in our employees. Every commitment, skill, feature and benefit we offer is dependent on the quality of our staff. Ingram believes that the single most important task of a company manager is to hire, train and retain the best people.

Ingram has built a talented, experienced staff of Associates dedicated to library service, including Collection Development and Technical Services Associates. Ingram Content has a staff of nearly 3,600 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.

Ingram has many **professional librarians on staff**, with 37 holding Masters Degrees in Library and Information Science. All of them have years of experience working in and with libraries.

Our blend of library experience, along with a 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.

Any of the staff assigned to the project may be reached at the following address:

Ingram Library Services LLC
One Ingram Blvd.
PO Box 3006
La Vergne, TN 37086-1986
Telephone: (800) 937-5300

The Ingram Team works closely with library staff during set-up and throughout the project to maintain open lines of communication.

In addition to the brief staff biography information provided below, we have also included resumes of key staff with our proposal.

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.

Pamela Smith - Vice President and General Manager. Before rejoining Ingram in 2010, Pamela was a Senior Vice President at Follett Corporation, where she was responsible for both Follett Library Resources and BWI brands. She began her library career at Baker & Taylor and held a previous executive position with Ingram Library Services.

Tammy Spurlock - Director of Sales Operations. Tammy has been with Ingram since 1985 and transitioned to Ingram Library Services in 2019. Most recently, she has been Director, Textbook & Retail System where she managed the Chegg Textbook relationship and the Point-of-Sale relationship with Point-of-Sale vendors. Prior to this, Tammy held several positions within Ingram Periodicals.

Toyka Lee - Manager of Credit for Libraries. Toyka has been with Ingram since 1991. Upon notification of award and establishing any required accounts for the Library, Toyka will assign a Credit Representative for your account.

Nina McClain, Vice President of Customer Care. Nina has been with Ingram since 1989, and is based in our Tennessee headquarters, where she has immediate access to all Executive Staff for any service issues that require escalation and further research and discussion. Together with **Shannon Bible**, Supervisor of Customer Care, the Customer Care team will handle any issues that may arise with the Library's accounts.

Sales Support

David Brooks - Director, Sales. David has an extensive background in sales and sales management. He has cultivated business and sales teams in the K-12, public and academic library markets over the last 20 years. David understands the complexities of selling content and technical services to libraries from his sales management roles at IXL Learning, Gale/Cengage, Innovative Interfaces and Follett.

Tricia Bengel, M.L.S. - Library Sales and Services Manager. Tricia was an Ingram customer during her eight years at Nashville Public Library. Tricia spent four years as Director of Library Technical Services at the Tennessee State Archives, and before that was Regional Library Consultant for Kentucky Department for Libraries & Archives. Tricia was previously Implementation Manager and SQL Analyst at Polaris Library Automation Systems – now Innovative Interfaces.

Stephen Casey - Senior Sales Representative for libraries in the State of Louisiana. He will serve as the main contact for all services Ingram provides. Stephen will provide an on-site relationship to monitor progress and trouble-shoot potential issues, making selection, ordering, and receiving materials smooth and simple.

Erin Eggert - Inside Sales Representative - will also be assigned to the Library, providing an additional level of sales support. **Lisa Johnson, Inside Sales Team Supervisor**, has over 30 years of Ingram experience in Customer Care and Sales.

Library Technical Services and EDI Staff

Gregory Pace - Director, Technical Services. Gregory oversees the Library Account Services and Client Integration teams. Previously Gregory serves as Library Operations Manager where he managed the Library Technical Services staff providing processing and cataloging services. Gregory has been with Ingram since 2003. His experience include Operations, Distribution and Library Processing, Account Services and Client Integration.

Jessica Short - Manager, Library Client Integration. Jessica serves as the primary contact and project manager for all customer integration projects and manages all aspects of customer integration from an account profile setup and operations standpoint. She works closely with all internal stakeholders to help move projects forward to a successful implementation.

Kari Ferrell - Account Services Manager. Kari 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 flowing, Kari will assume the role of the Library's contact from Michael Bush for cataloging and processing matters.

Jane Grawemeyer, M.L.S. - Cataloging Services Manager. Jane 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 para-professional catalogers work only on cataloging, so that they have increased efficiency and expertise.

Lory Koch - Manager of ILS Systems. Lory has been with Ingram since 1987 and worked with our library EDI customers between 1998 and 2011. Lory rejoined Ingram Library Services after serving as a Data Integration Specialist for Lightning Source, Ingram's print-on-demand company.

Genny Maxwell - EDI Support Specialist. Genny assists in setting up and maintaining EDI ordering streams, as well as helping to resolve customer issues involving EDI, ipage, and interfacing with library automation systems.

Collection Development Staff

Ann Lehue, M.S.I.S. – Sr. Manager, Collection Development. Ann manages a staff of five Associates that administer Ingram's Standing Order and Continuations programs. Prior to joining Ingram in 2011, Ann spent over six years working at a medium-sized public library, where she was promoted to Head of Reference & Acquisitions. Before coming to libraries, Ann was a district manager for Waldenbooks.

Beth Reinker, M.S.L.S. - Collection Development Manager, Adult Team. Beth joined the Ingram team in 2014. Her previous library experience includes working as a Collection Development specialist at Baltimore County Public Library (Maryland) where she was responsible for selection and collection maintenance and worked on several Opening Day Collection projects.

Becky Walton, M.L.I.S. - Collection Development Librarian II, Adult Team. Becky spent eight years assisting with selection of youth materials for Ingram before transitioning to the Adult Collection Development Team, where she utilizes her years of experience in selecting nonfiction titles. Before joining Ingram in 2008, Becky spent 13 years with the Gwinnett County Public Library.

Rachel Montgomery, M.L.I.S. - Collection Development Librarian II. Rachel joined the Ingram team in 2017. Before joining Ingram, she served as Collection Development Librarian for the Lake County Library System in Florida, where she was responsible for print and digital selection and collection maintenance.

Alex Arthun, MLS – Collection Development Librarian II, Adult Team. Alex joined Ingram in 2020. Although she is the newest member of our team, she spent the last 10 years doing collection development and maintenance for the Dauphin County Library System (Pennsylvania). Her specialties included selecting adult nonfiction, films, video games, juvenile and YA collections, and data analysis.

Laura Barkema, M.L.S. - Collection Development Librarian II, Adult Team. Laura joined our team in August 2018. Laura was at Boston Public Library from 2012 – 2018, most recently as Reader Services Specialist. She previously worked at Duquesne University Gumberg Library, Wartburg College Vogel Library, and interned at Carnegie Library of Pittsburgh-Squirrel Hill.

Kathryn Shaw, MLIS - Manager, Collection Development Programs. Kathryn manages a staff of five Associates that administer Ingram's Standing Order and Continuations programs. Kathryn came to Ingram in December 2019 with years of library experience. She was most recently a librarian at Nashville Public Library for seven years, and prior to that spent over seven years as an academic and public librarian in Michigan.

Debbie Davenport, M.S.L.S. - Collection Development Librarian II, Youth Team. Debbie joined Ingram in 2017 and focuses on Youth Nonfiction. Her previous library experiences include working in North Carolina as a Head Librarian and Branch Manager at the Tyrrell County Library and working as a Certified School Media Specialist at Roper Union Middle School.

Wendy Rancier, M.L.I.S. – Collection Development Librarian II, Youth Team. Wendy joined the Ingram Youth Collection Development team in 2017, after working for 13 years as the Youth Services Librarian for Roanoke County Libraries in south west Virginia. At the Library, she performed collection development for birth through age 12 for the 6-branch system, in addition to circulation and programming.

Gina Molter, M.L.I.S. - Collection Development Librarian II, Youth Team, is the newest member of the Collection Development Team, starting at Ingram in June 2019. Gina comes to us from Clermont County Public Library System in Milford, OH. She's also worked as a librarian at Beaufort County Public Library System in Lobeco, SC, and as a Second Grade Teacher in Atlanta and a First Grade Teacher in Ohio.

Mia Poole - Collection Development Analysis Manager. Mia has been with Ingram since May 2016. With a strong background in information services, Mia supports the Collection Development team through managing and analyzing data, as well as report creation and processing customer holdings data and pulling relevant product metadata for ODC lists. Mia is currently completing her M.L.I.S. at Wayne State University.

References

Please contact the references listed below to confirm quality of service and other pertinent information that will assist you in making an informed decision regarding this proposal.

1. Denver Public Library

Stacey Watson
Collection Services Manager
10 W 14Th Avenue Pkwy
Denver, CO 80204-2731
720-865-1217
swatson@denverlibrary.org

Description of Services: Ingram provides Denver Public Library print materials as primary vendor on an on-going basis, including processing and BookMARC cataloging. We have been providing library materials to DPL since 1991. Annual expenditures are in excess of \$1.5 million.

2. Allen County Public Library

Vasilka Todorinova
Acquisitions/Support Department Manager
7615 Disalle Blvd.
Fort Wayne, IN 46825-3374
(260) 421-1292
vtodorinova@acpl.info

Description of Services: Ingram provides processed and custom cataloging for library materials to Allen County Public Library since 1996. EDI ordering enriched data through the Symphony Unicorn system. Annual expenditures of over \$550,000 per year.

3. Kent District Library (also ODC reference)

Elizabeth Guarino-Kozlowicz
Manager, Library Collections
814 W River Center Dr Ne
Comstock Park, MI 49321-8955
(616) 784-2016
eguarino@kdl.org

Description of Services: Ingram provides processed and custom cataloging for library materials to Kent District Library since 2000. EDI ordering enriched data through the SirsiDynix Symphony system. Provided 2 ODC's; 2020 & 2017. Annual expenditures of over \$1,100,000 per year.

4. Queens Borough Public Library (also ODC Reference)

Hong Yao
Director, Technical Services
8911 Merrick Blvd
Jamaica, NY 11432-5242
(718) 990-0721
hong.yao@queenslibrary.org

Description of Services: Ingram provides processed and custom cataloging for library materials to Queens Borough Public Library since 1976. Have provided numerous ODC's for this customer. 2016 – 1, 2018 – 1, 2021 – 1. Annual expenditures of over \$500,000 per year.

5. Anythink Libraries (EDI & BISAC reference)

Logan McDonald
Director of Products & Technology
5877 E. 120th Ave
Thornton, CO 80602
(303) 405-3293
lmcdonald@anythinklibraries.org

Description of Services: Ingram provides processed and custom cataloging for library materials to Rangeview Library District since 2011. EDI ordering enriched data through the Horizon system. Annual expenditures of over \$500,000 per year.

Administrative and General Information:

Ingram has read, understands, and complies with the terms and conditions stated under your Administrative and General Information for requirements that are binding upon the awarded vendor and have not responded point-by-point but only where further explanation and clarification is needed as noted in subsections that follow.

1.15 Performance Bond

Ingram agrees to provide a 50% performance bond within ten days of written notification of award for the contract value of \$2,000,000 or more.

1.26 Insurance Requirements

Ingram is happy to provide a certificate of appropriate insurance coverage within ten working days of written notification of award. We do not issue separate additional insured endorsements, instead we have blanket additional insured provisions that grant additional insured coverage wherein Ingram is contractually obligated to provide such coverage. Also, our general liability aggregate does not apply separately to each project, but we have more than adequate excess limits if we need to show this on the certificate of insurance.

1.33 Payment for Services

Payment terms under this contract shall be NET 30 Days. Payment is required for invoices within these terms even when a purchase order has not been completed. Ingram does not invoice for items until they have been shipped. While other vendors demand payment from invoice date, Ingram's terms are calculated on statement date at the end of each month. With payment due 30 days from statement date, the customer's payment is due an average of 45 days from invoice (30-59 days).

1.34 Termination

Ingram acknowledges the Library shall have the right to cancel any contract resulting from any bid submitted. Ingram further states that we also reserve the right to cancel this contract with a thirty (30) days written notification for non-compliance with contract terms. Ingram would ask that the Library exercise due diligence in reporting any contract problems immediately to allow for verification and resolution before invoking contract termination clause. Any outstanding invoices will be due and payable at the time of termination.

Ingram agrees only to provide those items that would be available through normal U.S. wholesale channels. We do not agree to pay additional fees for items ordered from other vendors that are available through backorder from Ingram, or to pay fees for items that must be ordered directly from the publisher or manufacturer, or confirmed as items not stocked by Ingram. Ingram provides access to over 14,000,000 unique book titles and maintains the largest on hand inventory of any distributor in the book industry. Please note that inventory levels will always be governed by publisher availability.

The Library may cancel their account at the end of the fiscal year if it is determined that funding is not available to extend the contract. However, the Library is responsible for canceling any open items, and is responsible for any items ordered until written request for cancellation is processed.

1.36 EEOC and ADA Compliance

Ingram is committed to providing a work environment in which all decisions affecting the employment of associates are based on qualification, merit, and competence, without unlawful discrimination or harassment. It is the policy of the Ingram Content Group that all decisions regarding hiring, firing, or

changes in status of employment for any associate be made without discrimination based on race, color, religion, sex, national origin, age, disability, or veteran status.

1.39 Record Ownership

Ingram considers our cataloging records and other reports and documents to be intellectual property, and ownership must remain with Ingram.

1.42 Substitute of Personnel

We are also happy to inform the Library should any major changes in personnel take place. Please be assured that Ingram will make all personnel decisions in light of our mission: To be the Leading Provider of Service, Materials, and Information to Public Libraries.

ADDITIONAL /INNOVATIVE INFORMATION

Account Services

Upon award of contract, Ingram will set up the appropriate terms and discounts within our internal IT system. A detailed report is run to verify that all accounts match the terms of the contract, including discounts, freight, processing and cataloging prices, and payment terms. This report is verified by the Manager of Bids and Contracts. Ingram does not sell to individuals, but we can establish staff accounts. A Library staff account would ship and bill to the Library. We cannot accept personal checks from staff as payment, but can accept payment from the Library. The Library would be responsible for seeking reimbursement from staff members for their individual orders. Staff accounts would be charged tax and freight.

Collection Development Services

Ingram's Collection Development team is comprised of 11 MLS-degreed librarians and managers, 4 long-term publishing industry expert administrators, and 1 data manager partway through her library degree. Our 11 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, what makes 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 have purchased Ingram's custom Collection Development services for projects when lists from other vendors did not work. Ingram's MLS-degreed librarians and Program administrators work with you to find materials and develop your collections. Utilizing their public library selector experience and tracking trends that impact reading behavior, they identify the 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. They are grouped into five overarching services and feature 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 we have reporting to identify titles before they become popular in libraries because Ingram is the main provider of books to bookstores, large retail stores, and online booksellers.

Services include:

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

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,

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

Award & Noteworthy, and K12 and are updated regularly: weekly, monthly, quarterly, or annually, depending on type of list.

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.

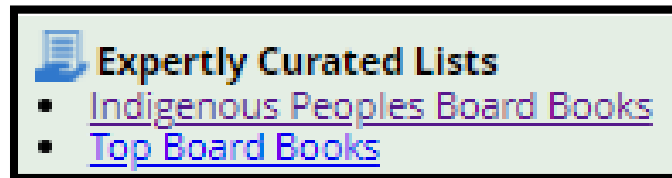
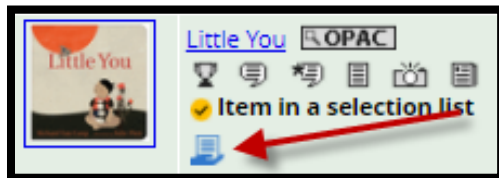
Ingram recognizes the need for more diverse books and creates regularly updated lists of diverse titles, such as *Asian Interest*, *Black Interest*, *Diverse Families*, *Income Inequality*, *Indigenous Interest*, *Latinx Interest*, *LGBTQIA+ Interest*, *Mental Health*, *Middle Eastern Interest*, *#ownvoices*, *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 so that we can 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 have created an "Expertly Curated" icon that appears under a title in your Search Results or Selection Lists that indicates that a title is in one

Black Interest

1960s Civil Rights Movement Bios & Memoirs - 09/14/2020	Black History and Culture - 12/02/2020	New & Forthcoming Black Nonfiction - 02/15/2021	Street Lit Essentials - 10/29/2020
#BlackLivesMatter Stories and Resources - 01/26/2021	New & Forthcoming Black Fiction - 02/12/2021	Street Lit Backlist - 02/12/2021	Street Lit New & Forthcoming - 02/12/2021
Black Graphic Novels - 02/01/2021			

or more of our Curated Lists. Within the title detail page, you can view the lists that 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 18 other quality titles.



Pricing: Complimentary

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

The Ingram Collection Development department curates, maintains, and manages 22 Standing Order Programs that help libraries easily track and order forthcoming titles from bestselling authors for all

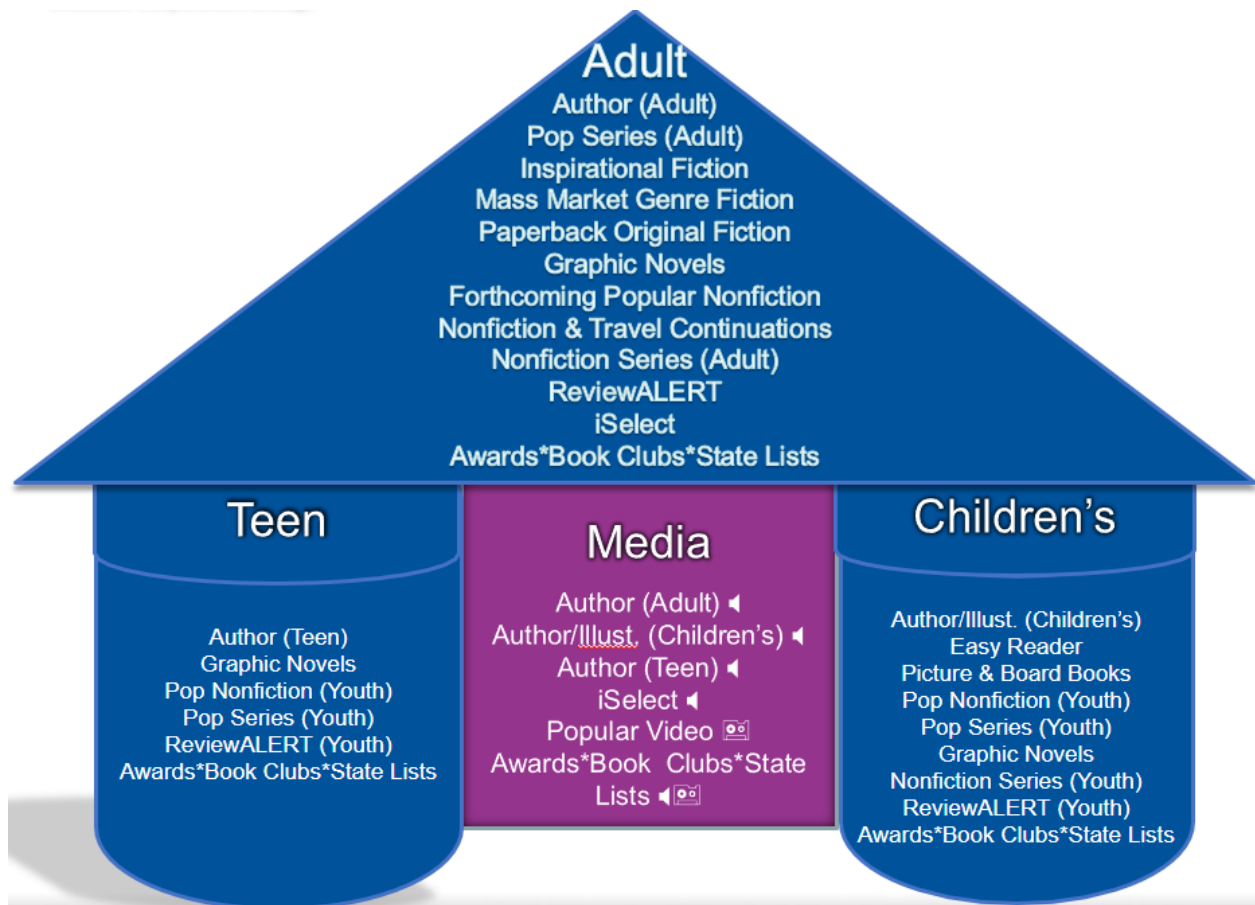
ages; Easy Reader series, Fiction, Nonfiction, and Graphic Novel series for all ages; Nonfiction and Travel Continuations; ReviewALERTSM Programs for Adult and Youth; hand-selected Programs for Board Books, Picture Books, Adult & Youth Nonfiction, paperback original Adult Fiction, and mass market genre 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: Profiles can be managed online through ipage 24/7, and changes to the enrollment profile take effect immediately with no waiting.
- ✓ Current: Ingram librarians and administrators hand-select and maintain offerings to ensure that only active offerings are included. We know that libraries do not want to tie up their budgets with titles that will never publish because of old offerings, so we meet and work with publishers constantly to stay on top of publishing news.
- ✓ Commitment-Free: With Ingram, you will 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 is automatically placed. Most titles are ordered 2-3 months prepublication (sometimes up to 6 months for the most popular authors), and you may also cancel backorders at any time before they arrive in our warehouses. Customers who enroll in Report Only receive lists and are free to edit and order on their own time schedule. In addition, Ingram does not alter the return policy on titles that are 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: Unlike some vendors, Ingram never reduces the discount or elevates the pricing on titles that run on a Standing Order Program. Our 22 Standing Order Programs truly are complimentary with no hidden costs.
- ✓ Customizable: Customers can mix-and-match Program profiles an infinite number of ways to ease their workflow and ordering process. Each profile can be renamed to prevent confusion. For example, someone could enroll in the Author (Adult) Program, rename it *Adult Fiction Hardcover*, and select only the hardcover bindings on the authors they want. They could then create a separate profile, rename it *Adult Large Print*, and select only the large print formats on the authors they want.

Our Programs allow line-item grids, so if a library always wants specific branch allocations and funding codes on a specific author and different ones on another, they simply select the correct grid for each offering in the enrollment form. When the lists are delivered, the correct grids will be applied already. Although libraries are always encouraged to review their Program lists, many Author (Adult) and Nonfiction and Travel Continuations customers with line-item grids set up simply allow the lists to automatically order in the background.

- ✓ **Customer Service:** Two long-tenured Customer Service Administrators provide special customer service for Standing Order Programs. Although our Programs are organized and automated enough that most libraries self-serve, our Administrators help libraries daily with everything from routine enrollment edits or cancelling or changing quantities on backorders to onboarding all the Standing Order Program enrollments from another vendor or answering specific questions about why a title did or did not run on a Program.
- ✓ **Comprehensive:** Ingram provides 22 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.

Forthcoming Popular Nonfiction (Adult)—Provides the best forthcoming Nonfiction titles (and simultaneously released CD audiobook & large print) each month, customizable by Dewey® Century and hand-selected by our expert librarians. Offers options for large, medium, and small libraries. Program runs monthly and includes titles up to three months prepublication.

Inspirational Fiction (Adult)—Includes the most in-demand trade paperback Fiction titles by customer-selected bestselling Inspirational Fiction authors. Program runs twice a month and includes titles up to six 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*; *General Romance A, B, & C*; *Historical Romance A & B*; *Mystery A, B, & C*; *Speculative Fiction A, B, & C*; 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 do not want to receive a title every time it updates, you can select a 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.

Paperback Original Fiction—Provides notification of the original mass market paperbacks (20/month) and original trade paperbacks (20/month or 40/month) that are forecasted to have the highest demand. Program runs once a month and includes titles up to two months prepublication,

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

ReviewALERTSM (Adult)—Notifies customers when titles receive a review 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 do not want to receive a title every time it updates, 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.

Picture and Board Books—Offers the best upcoming Picture Books and Board Books. Hand-selected by a children’s librarian, this Program offers 25 or 50 Picture Books and 10 or 20 Board Books. Program runs once a month and includes titles up to three months prepublication.

Popular Nonfiction (Youth)—Offers the top hand-selected titles in Easy Nonfiction (10 titles), Juvenile Nonfiction (15 titles), and/or YA Nonfiction. Program runs once 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.

ReviewALERTSM (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®—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.

Pricing: Complimentary

iCurate Connection: Collection Development Services Newsletter

The Ingram Collection Development team constantly updates the Standing Order Programs to ensure that libraries are only enrolled in offerings that will produce titles. To keep customers updated on those changes, the team publishes a monthly newsletter, *iCurate Connection*, that lists all the changes and noteworthy news in each program.

Important Standing Order Program information such as new offerings, offerings that have been ceased by the publisher, titles that will not run on a Program and why they will not 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.”

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 the 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 on top of publishing and cultural trends and use their public library experience to tailor each list to include what they would want in their own public library collection to increase circulation. The 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 will also reflect publishing-industry schedules and include more titles in October than in February and will reflect the seasonality of different subjects throughout the year.

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 on customer-created and Ingram-delivered Selection Lists, iCurate *Complimentary* Curated Lists, and in Search Results quickly and easily. It allows users to filter Selection Lists and Search Results to include or to exclude titles that are already in another Selection List(s), Ordered from Ingram, and/or in their Holdings (if submitting holdings to Ingram via Z39.50).

1. Search results and Ingram Curated Lists (hiding duplicates) – When the user is searching and gets a list of results or viewing the iCurate *Complimentary* Curated Lists in ipage, *Coming Soon* customers will see an additional set of options for filtering on the left side of the screen, **Manage Duplicates**: Under **Manage Duplicates**, users can *Exclude* titles from view if they are on a Selection List, Ordered



Manage Duplicates

<input type="checkbox"/> Include	<input type="checkbox"/> Exclude	Manage Duplicates
<input type="checkbox"/>	<input type="checkbox"/>	Items on Lists
<input type="checkbox"/>	<input type="checkbox"/>	Ordered Items
<input type="checkbox"/>	<input type="checkbox"/>	Items on My Lists
<input type="checkbox"/>	<input type="checkbox"/>	Items on Other Lists
<input type="checkbox"/>	<input type="checkbox"/>	Items on Ingram Lists

from Ingram, or in their Holdings (if participating). This is a quick, easy way to eliminate those titles from view in Search Results or the Curated Lists so that you don't accidentally add duplicates to a list you are creating.

2. **Selection Lists** (deleting duplicates) – In a Selection List (customer-created or Ingram-created, such as iCurate *Coming Soon* or Standing Order Program lists), users can filter to *include* duplicates to make it easier to remove those from their Selection List. Once your list shows only the duplicates, you can then choose to delete all visible titles from your selection list with a simple click, or to review each one and hit the delete icon only where desired. The icons showing which Lists each title is duplicated on help you determine if duplication is merited.

Introduced at PLA 2020, iCurate *Coming Soon* attracted the attention of busy librarians and has garnered praise for its quality and comprehensiveness: "I am already happy with the titles I wouldn't normally see in my review lists. Gathering these titles would require extra work and time I rarely have. A+!" (Jeremy Bloom, Lincoln Parish Library)

Ingram's iCurate *Coming Soon* has several advantages for libraries wanting monthly custom lists delivered:

Cost-Effective:

- ✓ Annual subscription is \$775/age level (Adult, Children's, Teen)
- ✓ Select All Ages & save: \$2,100 per year
- ✓ No hidden costs—discount is the same whether or not you get a title through this service, and we do not change the returns policy

Convenient:

- ✓ **Enhanced Duplication Management** feature for quick-click deduplication against your Holdings, On Order, or In a Selection List
- ✓ Allows you to quickly deduplicate *Coming Soon* lists, Selection Lists, iCurate *Complimentary* Curated Lists, and Search Results across ipage
- ✓ **Enhanced Duplication Management** available exclusively to iCurate *Coming Soon* subscribers

Customizable:

- ✓ Mix & match small, medium, and large lists by collection
- ✓ Select list size based on circulation, budget, or selector preference
- ✓ Have lists delivered to specific ipage account users based on how you set up enrollments

Comprehensive:

- ✓ Forthcoming, new, and timely titles selected by MLS-degreed librarians
- ✓ Date range up to 120 days prepublication
- ✓ No gaps or duplication within the iCurate *Coming Soon* service

Your iCurate *Coming Soon* lists will never duplicate each other, so you will never see the same title run multiple times on a list or on multiple lists. To maintain affordability, *Coming Soon* lists reflect the binding preferences of most of our customers:

1. Hardcover
2. Trade Paperback

3. Library Binding
4. Mass Market Paperback

and will not include reprints unless it is truly a new edition with updated content.

The iCurate *Coming Soon* subscription ensures that you will not miss big titles while also balancing the midlist and other parts of the collection and catching titles that unexpectedly pop as they are being released. To that end, *Coming Soon* lists are selected using a rolling set of publication dates (Last Month + Current Month + 3 Months). The bulk of the list will be the latest month available (for example, October titles in the July 1 lists); titles from other months in the date range may also be included based on predicted popularity and review coverage. Drop-in titles will also be included to be sure your library sees popular titles that you won't want to miss. These are the titles that our librarians believe are needed to build a balanced collection over the course of the year. They will include bestsellers as well as standard titles and topics needed to round out a public library collection.

Want to keep your Author Standing Order Program with its line-item grids and other Standing Order Programs that work well for your needs while still avoiding duplicates? The Enhanced Duplication Management feature makes that easy.

Annual Pricing: \$775 Adult, \$775 Children's, \$775 Teen, or \$2,100 for All Ages

iCurate Core: One-Time Gap Analysis

From time-to-time, our collections get out of balance or are missing key titles or even sections, or we just want to know where we stand.

Ingram's Collection Development librarians have all worked in public libraries and have struggled with these issues first-hand. That's 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 iCurate *Core* service provides a one-time set of lists that include classics, standards, evergreen titles, and new, popular titles that a public library should own, compared to an author/title match of your submitted holdings, to identify which titles are missing from your collection. These lists are created by our team of experienced, MLS-degreed librarians.

The lists come in an Excel list format with value-added information and estimated actual customer pricing to make it easier to budget. Besides standard fields such as title, author, publisher, EAN, Dewey, BISAC, pricing information, and more, these 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 more copies of a title or to replace a worn version, and ordering can be done 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, so titles that you already have in your library in a different binding, such as hardcover versus paperback, should show as held. 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.

These lists are intended to be purchased one time, every few years, or annually. They provide a starting place to show which essential and currently popular titles are missing so that you do not have to spend weeks or months analyzing the collection and searching for replacement titles to order. They could also be used annually after weeding to replace essential items that got pulled because of condition.

Pricing: \$1,000 each for Adult, Children's, or Teen, or \$2,800 for All Ages

iCurate *inClusive*: Diversity Audits Made Easy

Books offer children and adults mirrors to see themselves in what they are reading, and windows to see others in what they are reading (Rudine Bishop). According to [School Library Journal](#), almost 95% of librarians agree that having a diverse collection is either important or very important.

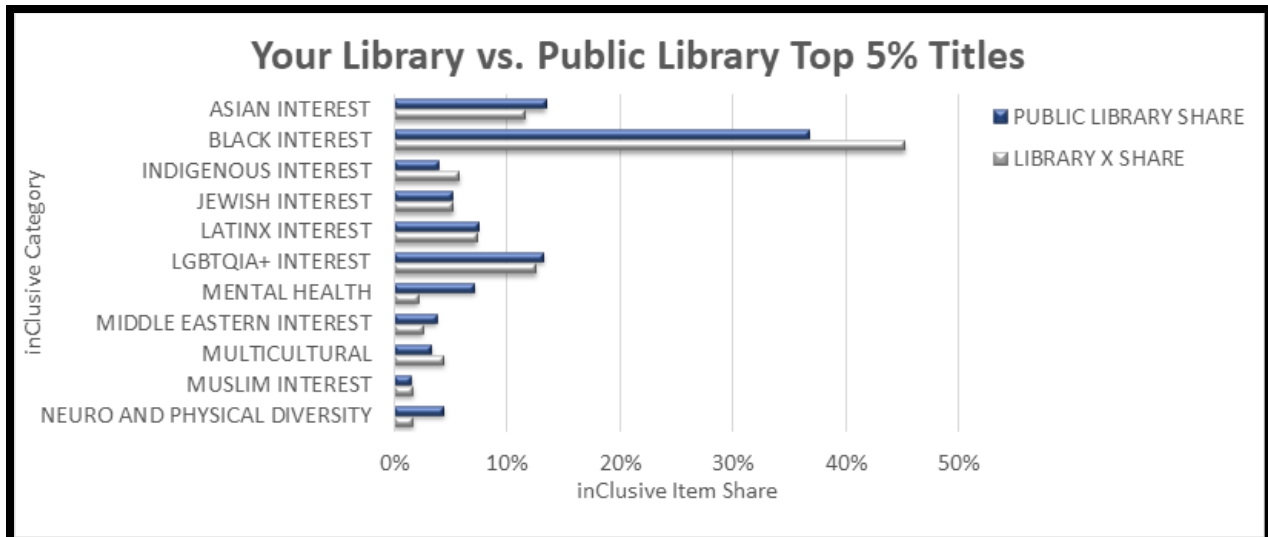
At the same time, the publishing industry acknowledges a lack of diverse voices, editors, and leaders, and standard metadata rarely helps identify diverse titles. As a result, diversity audits of a collection are typically manual, time-consuming, and tedious.

With iCurate *inClusive*, a library purchases a one-time assessment of the diversity of their holdings, they email their holdings EANS to Ingram, and within two weeks, they receive eye-catching reporting on the diversity of their collection for their library board or funding agency, along with lists of the diverse titles they are missing that are most popular in public libraries.

The purchase options include Adult, Children's, Teen, or a bundle of All Ages, and the purchase comes with the following:

- More than 60 charts and graphs showing the diversity of your collection compared to the top 5% of titles sold into public libraries 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.



Audience	Collection	Asian Interest	Black Interest	Indigenous Interest	Jewish Interest	Latinx Interest	LGBT Interest	Mental Health	Middle Eastern
Adult		8,898	18,050	3,169	4,542	5,296	9,451	3,217	
	Adult 000	32	88	33	10	26	4	0	
	Adult 100	181	224	27	59	34	50	510	
	Adult 200	470	651	128	1,110	110	176	95	
	Adult 300	1,520	3,178	571	410	1,186	1,125	314	
	Adult 400	114	36	33	23	5	8	3	
	Adult 500	35	58	21	5	16	3	2	
	Adult 600	664	452	70	118	363	84	1,061	
	Adult 700	892	1,176	164	118	398	228	13	
	Adult 800	614	1,421	173	155	443	703	35	
	Adult 900	1,270	1,185	745	656	677	61	10	
	Adult Biography	612	2,451	292	720	393	879	587	
	Adult Fiction	2,410	7,023	810	1,128	1,610	5,881	531	
	Adult Graphic Novel	84	107	102	30	35	249	56	
Children's		732	1,623	355	333	526	198	89	
	Board Book	9	30	5	20	2	6	0	
	Children's Fiction	273	396	111	104	219	43	56	
	Children's Graphic Novel	78	128	5	27	57	62	9	
	Children's Nonfiction	119	537	176	74	108	26	10	
	Easy Nonfiction	5	8	1	2	3	2	0	
	Easy Reader Fiction	64	34	3	0	18	0	0	
	Easy Reader Nonfiction	1	26	1	1	1	0	0	
	Picture Book	183	464	53	105	118	59	14	
Teen		494	887	272	208	392	1,360	434	
	Teen Fiction	354	543	148	154	320	826	348	
	Teen Graphic Novel	119	274	111	34	55	491	32	
	Teen Nonfiction	21	70	13	20	17	43	54	
Grand Total		10,124	20,560	3,796	5,083	6,214	11,009	3,740	

- Excel spreadsheet that can be edited, filtered, sorted, and duplicated with 24 subject breakouts that includes number of diverse titles currently in your collection in each diversity category, allowing you to track and enter new purchases to create “after” reporting.

- Shoppable lists of the diverse titles that are most popular in public libraries, with your holdings (title/author match) and the diversity codes marked, to facilitate filling in any gaps identified so that you can take immediate action:

Adult Lists

Fiction
Graphic Novels
Nonfiction 000s
Nonfiction 100s
Nonfiction 200s
Nonfiction 300s
Nonfiction 400s
Nonfiction 500s
Nonfiction 600s
Nonfiction 700s
Nonfiction 800s
Nonfiction 900s
Nonfiction Biographies

Children's Lists

Board Books
Easy Nonfiction
Easy Reader Fiction
Easy Reader Nonfiction
Juvenile Fiction
Juvenile Graphic Novels
Juvenile Nonfiction
Picture Books

Teen Lists

Fiction
Graphic Novels
Nonfiction

- Links to the iCurate *Complimentary* Diverse Title Lists provided within ipage for ongoing support:

Adult	Children's	Teen
<ul style="list-style-type: none">• Adult/YA Crossovers• Asian Interest• Black Interest• Debut• Genre Fiction• Graphic Novels• Greatest HITS (High Interest Title Selections)• High/Low• HITS (High Interest Title Selections)• Indigenous Peoples Interest• Large Print• Latinx Interest• LGBTQIA+ Interest• Middle Eastern Interest• Social Awareness• Spanish Language Books• Subject Lists• Top Library Titles• Virtual Book Display	<ul style="list-style-type: none">• Asian Interest• Black Interest• Board Books and Big Books• Children's/Teen Crossovers• Debut• Genre Fiction• High/Low• HITS (High Interest Title Selections)• Indigenous Peoples Interest• Latinx Interest• LGBTQIA+ Interest• Middle Eastern Interest• Social Awareness• Spanish Language Books• Top Library Titles• Virtual Book Display	<ul style="list-style-type: none">• Adult/YA Crossovers• Asian Interest• Black Interest• Children's/Teen Crossovers• Debut• Genre Fiction• Graphic Novels• High/Low• HITS (High Interest Title Selections)• Indigenous Peoples Interest• Latinx Interest• LGBTQIA+ Interest• Middle Eastern Interest• Social Awareness• Spanish Language Books• Top Library Titles• Virtual Book Display

All this reporting and the lists of diverse titles will arrive in two weeks rather than over a period of months or years and will save possibly hundreds of hours of payroll time. It will also allow libraries to quickly fill in gaps so that their communities benefit almost immediately.

Diversity is at the forefront of Collection Development and in the US, but publishing is not diverse enough for things to “just work out.” By purchasing this service, you can spend the bulk of your money on filling in the diverse title gaps rather than on extravagant fees for reporting and analysis or on extra payroll for a lengthy diversity audit process.

Ingram’s Collection Development librarians have assigned value-added metadata in our applications for years, and we have ingested out-of-print holdings from the largest libraries in the country to make sure our reporting is as accurate and thorough as possible, even on older collections. This will also make title/author matching more complete if these titles come back into print in the future, since the value-added information already exists in the database.

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 who need lists of titles not available in ipage Curated Lists that are also difficult to search for in ipage.

Generally, these custom lists are targeted toward 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 get this complimentary project started, libraries contact their sales representative, who will provide them with the appropriate form that includes subject(s), budget, date the lists are needed, preferred publication date range, binding preference, and other pertinent information.

Ingram’s Collection Development librarians have extensive experience creating these types of lists and have created lists for everything from religious books for the Qatar National Library to a large librarian professional development collection for a public library in Florida, to a marijuana collection in a public library in Colorado the week it was legalized. 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.

PAMELA R. SMITH

Vice President and General Manager

CAREER HISTORY

2018-Present	Vice President and General Manager Ingram Library Services LLC La Vergne, TN
2012-2018	Vice President, Sales Ingram Library Services LLC La Vergne, TN
2006-2011	Senior Vice President Follett Corporation Grove, IL
2004-2006	Vice President and General Manager Ingram Library Services Inc. La Vergne, TN
2002-2003	Sr. Vice President & Chief Marketing Officer Baker & Taylor, Inc. Charlotte, NC
1997-2000	Sr. Vice President, Sales and Marketing Baker & Taylor, Inc. Charlotte, NC
1996-1997	Vice President, Sales and Marketing, Customized Library Services Vice President, Customer Relations Baker & Taylor, Inc. Charlotte, NC
1994-1995	Project Director Baker & Taylor, Inc. Bridgewater, NJ
1993-1994	Director of Sales and Marketing, School Division Baker & Taylor, Inc. Charlotte, NC
1991-1993	Director, Sales and Marketing Baker & Taylor, Inc. Commerce, GA

EDUCATION

B.S. and M.B.A.	Brenau College, Gainesville, GA
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TAMMY SPURLOCK

Director of Sales Operations

CAREER HISTORY

9/19 - Present	Director of Sales Operations Ingram Library Services La Vergne, TN
2017- 2019	Director of Textbooks and Retail Systems Ingram Content Group La Vergne, TN
1985 – 2017	Director of Inventory Control and Publisher Relations Manager Inventory Control Manager Customer Service Manager Accounting Services Ingram Periodicals La Vergne, TN

EDUCATION

B.A.	Middle Tennessee State Murfreesboro, TN
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TRICIA RACKE BENGEL, M.L.S.

Library Sales & Services Manager

CAREER HISTORY

05/17 – Present	Library Sales & Services Manager Ingram Library Services LLC La Vergne, TN
08/08 – 06/16	Associate Director for Collections & Technology Services Nashville Public Library Nashville, TN
09/04 – 08/08	Director of Library Technical Services Tennessee State Library & Archives Nashville, TN
05/02 – 09/04	Regional Library Consultant Kentucky Department for Libraries & Archives Frankfort, KY
10/96 – 05/02	Implementation Manager/SQL Analyst Polaris Library Automation Systems (now Innovative Interfaces) Syracuse, NY

EDUCATION

M.L.S.	University of Kentucky Lexington, KY Library Science
B.A.	University of Kentucky Lexington, KY English, Secondary Education

PROFESSIONAL ORGANIZATIONS

American Library Association Member since 1996
PLA Member since 2008
Tenn-Share member since 2004
OCLC Global Council Member 2013-2016

DAVID BROOKS

Director, Sales

2/21 - Present	Director of Sales Ingram Library Services La Vergne, TN
1/20-1/31/2021	Independent Sales Consultant Facilitate all facets of the sales cycle, including lead generation to close within public library, K-12, and health care industries Plainfield, IL
5/2019–11/2019	District Sales Manager IXL Learning, Inc. San Mateo, CA
2014- 4/30/2019	District Sales Manager Gale, A Cengage Company Farmington Hills, MI
2013-2014	Regional Sales Manager Innovative Interfaces Emeryville, CA
2008-2013	Sales Director Follett Corporation McHenry, IL
1996-2008	Account Manager Follett Corporation McHenry, IL

EDUCATION

M.B.A.	Roosevelt University Business Administration Chicago, IL
B.S.	Eastern Illinois University Business Management Charleston, IL

GREGORY PACE

Director, Technical Services

CAREER HISTORY

03/18 - Present	Director, Technical Services Ingram Library Services LLC La Vergne, TN
02/17 – 03/18	Operations Manager, Library Ingram Library Services LLC La Vergne, TN
08/14 – 01/17	Manager, Client Integration Ingram Library Services Inc. La Vergne, TN
08/12 – 08/14	Distribution Specialist Ingram Library Services Inc. La Vergne, TN
10/08 – 08/12	Operations Supervisor Ingram Library Services Inc. La Vergne, TN
01/04 – 10/08	Operations Team Lead Ingram Library Services Inc. La Vergne, TN

EDUCATION

M.B.A.	Middle Tennessee State University Murfreesboro, TN Management
B.A.	Middle Tennessee State University Murfreesboro, TN Music Business/Mass Communication

ADDITIONAL TRAINING

Advanced Project Management	Project Management Institute (2012)
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JESSICA SHORT, M.L.I.S.

Client Integration Manager

CAREER HISTORY

01/20 – Present	Client Integration Manager Ingram Library Services LLC La Vergne, TN
07/16 – 01/19	Content Operations Manager ProQuest Seattle, WA
01/12 – 07/16	Digital Collections Supervisor Tennessee State Library and Archives Nashville, TN
12/10 – 01/12	Librarian Charleston Library Society Charleston, SC

EDUCATION

M.L.I.S.	University of South Carolina Columbia, SC Library Science
BA	Sewanee: University of the South Sewanee, TN English

PROFESSIONAL ORGANIZATIONS

American Library Association Member since 2013
Society of American Archivists Member 2010-2016

LORY KOCH

Manager, ILS Systems

CAREER HISTORY

01/15 – Present	Manager, ILS Systems Ingram Library Services LLC La Vergne, TN
01/13 – 12/14	Data Integration Specialist, EDI & Logistics Ingram Content Group La Vergne, TN
10/09 – 01/13	IT – Programmer / Analyst Ingram Content Group La Vergne, TN
10/04 – 10/09	EDI Support Specialist Ingram Library Services Inc. La Vergne, TN

EDUCATION

Diploma	Cannon County High School Woodbury, TN
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Stephen Casey

Senior Sales Account Executive

Dallas, Texas (214) 952-6310 stephen.casey@ingramcontent.com

Results driven field based sales representative with extensive track record of sales success. Self-starter known for consistently increasing revenues within a defined territory. Equally adept working independently and within a team environment. Experience selling both technology and non-technical products to the school, higher education, and library markets.

EXPERIENCE

Ingram Content Group 2012 - present

Senior Sales Representative

Responsible for account management and sales of library materials to public and school libraries in AR, AZ, CO, LA, MS, NM, OK and TX.

Serials Solutions; ProQuest 2010 - 2011

Account Executive

Responsible for new sales of e-resource management and access software to academic libraries in AR, AZ, KS, LA, MO, NM, OK and TX.

- Built a \$1.5M+ sales pipeline.
- Negotiated major software deals in a complex and highly competitive selling environment, including sale of company's flagship product, The Summon Service, to University of Arkansas Little Rock, University of Houston Clearlake, Langston University and Missouri Southern State University.
- Unseated company's biggest competitor at William Jewell College, paving the way for The Summon Service to be adopted by other small colleges and universities.
- Closed additional software sales with University of Texas Austin, University of Missouri Columbia, University of Texas Health Science Center San Antonio, Texas Christian University, and others.

Scholastic 2005 - 2009

Account Executive

Responsible for sales of classroom book collections, leveled reading programs, and literacy partnerships to schools and school districts, as well as materials to school and public libraries in north Texas.

- Achieved one of highest revenue territories in '08 FY with \$2.45M in sales.
- Worked closely with five inside sales representatives to consistently achieve territory goals.
- Produced approximately \$2M in sales from Dallas ISD and Fort Worth ISD.
- Provided hundreds of thousands of books to children from low income homes through sales efforts working with Reading Is Fundamental and other Scholastic literacy partners.

Homebridge Financial 2003 - 2005

Licensed Realtor

Responsible for sales of customized equity funding plans, assisting homeowners with the sale of their current properties in coordination with the purchase of newly built homes in north Texas.

Gale and Information Access Company (merged with Gale 1/99)

1998 – 2003

Account Manager, Account Executive, Senior Account Executive

Responsible for sales of reference books and on-line research databases to academic libraries, public libraries, and library consortia in LA, OK, and TX.

- Received Goal Getters Award for exceeding all 2002 sales targets.
- Awarded Sales Manager's Market Leader Award in 2001 for taking leadership role in company.
- Closed largest sale in company history in 2001 – a \$2.52M annual subscription.
- Promoted to newly created position of Senior Account Executive, providing the opportunity to mentor new hires and assist with other management responsibilities.
- Achieved Presidential Circle Award in 2000 for surpassing new business goal by over \$500K.
- Received Sales Pacesetter Award in 1999 for achieving 114% of new business goal.
- Reversed negative sales trend in Information Access Company's most underperforming region, exceeding projected year-end territory value in 1998 by over \$400K.

Copicard

1992 - 1998

Account Manager

Responsible for sales of magnetic cash card systems to libraries and office products dealers in the U.S.

EDUCATION

University of Texas at Austin; MBA

University of Copenhagen; Advanced Business & Management Program

Vanderbilt University; BA

University of Leeds; Junior Year Abroad

SALES COURSES COMPLETED

John Costigan

Lawrence Associates

Carew International

Target Account Selling

CRM EXPERIENCE

QuickBase

Salesforce

Siebel

TMS360

COMMUNITY CONTRIBUTIONS

- Recognized for consistently making large book donations to children's hospitals, school libraries, and public libraries in the Dallas area. Several articles published in local newspapers informing the community about these gifts.
- Increased membership for The Nature Conservancy of Texas serving on their Outreach Committee since 2006.
- Coached youth soccer and basketball for the YMCA from 2002 – 2010.



Brian Dauphin
Chief Financial Officer

brian.dauphin@ingramcontent.com
Phone: (615) 213-4465 Fax: (615) 213-5824

May 20, 2021

Jefferson Parish
Department of Purchasing
P. O. Box 9
Gretna, LA 70054

Attn: Ms. Sidney Duffy

I am writing you in response to your request for Audited Financial Statements. Ingram Library Services is part of Ingram Industries Inc., a privately owned company. As such, financial information is not disclosed and the company is not separately audited. In an effort to satisfy your request, I am enclosing a Schedule of Total Assets, Net Worth and Total Revenues as of and for the year ended December 31, 2020 for Ingram Content Group. Ingram Library Services is part of the Ingram Content Group of companies. Please treat this as proprietary and confidential.

Please contact me if you have any questions.

Regards,

A handwritten signature in black ink, appearing to read "Brian Dauphin". The signature is fluid and cursive, with the first name "Brian" and last name "Dauphin" clearly distinguishable.

Brian Dauphin

Enclosures

/klp

CONFIDENTIAL

Ingram Content Group

**Schedule of Total Assets, Net Worth and Total Revenues
As of and for the year ended December 31, 2020**



Report of Independent Auditors

To the Board of Directors of Ingram Industries Inc.

We have audited the accompanying schedule of total assets, net worth and total revenues of Ingram Content Group, a division of Ingram Industries Inc., as of and for the year ended December 31, 2020.

Management's Responsibility for the Schedule of Total Assets, Net Worth and Total Revenues

Management is responsible for the preparation and fair presentation of the schedule of total assets, net worth and total revenues in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of the schedule of total assets, net worth and total revenues that is free from material misstatement, whether due to fraud or error.

Auditors' Responsibility

Our responsibility is to express an opinion on the schedule of total assets, net worth and total revenues based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the schedule of total assets, net worth and total revenues is free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the schedule of total assets, net worth and total revenues. The procedures selected depend on our judgment, including the assessment of the risks of material misstatement of the schedule of total assets, net worth and total revenues, whether due to fraud or error. In making those risk assessments, we consider internal control relevant to the Company's preparation and fair presentation of the schedule of total assets, net worth and total revenues in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Company's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the schedule of total assets, net worth and total revenues. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Opinion

In our opinion, the schedule of total assets, net worth and total revenues referred to above presents fairly, in all material respects, the total assets, net worth and total revenues of Ingram Content Group as of and for the year ended December 31, 2020 in accordance with accounting principles generally accepted in the United States of America.

PricewaterhouseCoopers LLP

March 16, 2021

Ingram Content Group

Schedule of Total Assets, Net Worth and Total Revenues

As of and for the year ended December 31, 2020

(Dollars in thousands)

Total Assets	\$ 943,277
Net Worth	\$ 286,321
Total Revenues	\$2,200,103

The accompanying notes are an integral part of this schedule.

Ingram Content Group

Notes to Schedule of Total Assets, Net Worth and Total Revenues

NOTE 1 – THE COMPANY

Ingram Content Group (“the Company”), a division of Ingram Industries, Inc., is engaged in the wholesale distribution of content including book distribution, print on demand, and digital content services. The entities comprising the Company include the following entities and their subsidiaries, Ingram Book Group LLC, Ingram Library Services LLC, Tennessee Book Company LLC, Lightning Source LLC, Ingram Publisher Services LLC and Vital Source Technologies LLC. The Company conducts the majority of its operations in the United States.

NOTE 2 – BASIS OF PRESENTATION

The schedule of total assets, net worth (defined as total assets less total liabilities) and total revenues is comprised of the total assets, net worth and total revenues of the Company as of and for the year ended December 31, 2020.

Total assets, net worth and total revenues are elements of the Company's financial statements as of and for the year ended December 31, 2020, which have been prepared in accordance with accounting principles generally accepted in the United States of America (“GAAP”). All significant intercompany balances and transactions have been eliminated. GAAP requires management to make estimates and assumptions that affect the reported amounts and related disclosures. Such estimates and assumptions are subject to change.

NOTE 3 – FINANCIAL STATEMENT COMPONENTS COMPRISING TOTAL ASSETS, NET WORTH AND TOTAL REVENUES AND RELATED KEY ACCOUNTING POLICIES

Cash equivalents are short-term investments with an original maturity of three months or less from the date of purchase.

Investments and other include equity securities and bonds. The Company has adopted guidance related to fair value measurements. This guidance prescribes a methodology to measure fair value for certain assets and liabilities recorded or disclosed in the Company's consolidated financial statements. Fair value measurements consist of quoted prices in active markets for identical assets and liabilities (Level 1), significant other observable inputs (Level 2), and significant unobservable inputs (Level 3). The Company has de minimus Level 3 assets.

At December 31, 2020 the Company had no equity securities or bonds that were considered available for sale. Other investments are carried at cost.

Ingram Content Group

Notes to Schedule of Total Assets, Net Worth and Total Revenues

Revenue is recognized according to the respective line of business. The Company adopted guidance regarding revenue recognition effective January 1, 2019 with no significant impact on its financial position or results of operations. The core principle of the new guidance is to recognize revenue in amounts that reflect the consideration to which the Company expects to be entitled in exchange goods or services.

Wholesale distribution revenue includes wholesale book distribution revenue which is recognized at the time of product shipment when control passes to customers. Under specific conditions, the wholesale book distribution customers are permitted to return or exchange products. Revenue is recognized inclusive of variable consideration including estimated returns and early pay discounts using the most likely amount method. Revenue from publisher distribution services, which is included as a part of wholesale distribution revenue, is recognized primarily at a point in time when the service fees are earned. Revenue from print on demand services is recognized primarily at the time of product shipment. Textbook rental revenue is recognized ratably over the rental period. Revenue related to digital content services is recognized ratably over the product subscription period or at a point in time when earned. Payment terms are established based on each individual customer's credit worthiness.

Uncollectible receivables are provided for using the allowance method.

Inventories of books are valued using the last-in, first-out ("LIFO") method. Other inventories are valued at the lower of average cost or market.

Intercompany balances due from (to) the parent represent amounts currently owed from or to the ultimate parent, Ingram Industries Inc. as a result of consolidated treasury operations.

Equipment and other properties are recorded at cost and depreciated using principally straight-line and accelerated methods over the estimated useful lives of the related assets, which range from three to thirty-five years. Maintenance and repairs are charged to expense as incurred. Additions and betterments to property and equipment are capitalized. Realization of carrying value is assessed periodically.

Intangibles include goodwill resulting from the acquisition of various businesses and intangible assets subject to amortization. The Company adopted the private company guidance related to accounting for goodwill. Goodwill is amortized on a straight-line basis over 10 years. An annual impairment evaluation is not required unless a triggering event has occurred. If a triggering event does occur, the Company has elected to evaluate for impairment at the reporting unit level. The Company did not experience any triggering events in 2020. Intangible assets subject to

Ingram Content Group

Notes to Schedule of Total Assets, Net Worth and Total Revenues

amortization include software and other intangible assets. The intangible assets subject to amortization are amortized on a straight-line basis over a period of 5 to 10 years.

Deferred income taxes are provided for the temporary differences between the financial reporting basis and the income tax basis of the Company's assets and liabilities. The Company has adopted guidance regarding accounting for uncertainty in tax positions.

Financial instruments are recorded at amounts which approximate their fair value. There are no significant concentrations of credit risk.

NOTE 4 – SUBSEQUENT EVENTS

The Company has evaluated events occurring between December 31, 2020 and February 26, 2021, the date the financial statements were available to be issued, and updated its evaluation of events up to and including March 16, 2021 the date this schedule was available to be issued, for proper recording and disclosure in the financial statements.



JEFFERSON PARISH

DEPARTMENT OF PURCHASING

CYNTHIA LEE SHENG
PARISH PRESIDENT

RENNY SIMNO
DIRECTOR

June 3, 2021

ADDENDUM #1

RFP No.: 0423

Receipt Date: June 9, 2021

TO PROVIDE FOR THE PURCHASE, CATALOGING AND PROCESSING OF NEW SHELF-READY BOOKS FOR THE JEFFERSON PARISH LIBRARY DEPARTMENT.

CLARIFICATION:

Questions are as follows:

1. What is your annual budget for printed book materials?
2021 Budget - \$1,000,000.00
2022 Budget - \$1,000,000.00
2. There are two references in the RFP to opening day collections or updating collections for additional, replacement or renovated facilities – a) page 4 – 1.1 Background and b) page 20 under Selection –
 - Can you tell us either the budget amount for these projects or the number of volumes you intend to purchase for these projects?
\$184,000 has been budgeted for an e-branch in Avondale, LA.; but this project is not guaranteed.
 - Can you tell us the approximate delivery date for these projects?
There is no firm or approximated date for any opening day collections, but the vendor who is awarded the contract should be prepared to handle such a project if the need arises. This type of project would not be expected to require a quick turn around on materials.
3. On page 21 under Cataloging –
 - Can you provide more detailed cataloging, classification and cutting requirements than what is included in the RFP?
The Dewey Decimal Classification is a library classification system which allow new books to be added to a library in their appropriate location based on subject. The classification's notation makes use of three-digit numbers for main classes, with fractional decimals allowing expansion for further detail. A library assigns a classification number that unambiguously locates a particular volume in a position relative to other books in the library, on the basis of its subject. The number makes it possible to find any

GENERAL GOVERNMENT BLDG. – 200 DERBIGNY ST., SUITE 4400, GRETN, LA 70053
OFFICE 504.364.2678

JOSEPH S. YENNI BLDG. – 1221 ELMWOOD PARK BLVD., SUITE 404, JEFFERSON, LA 70123
OFFICE 504.364.2678

EMAIL: PURCHASING@JEFFPARISH.NET WEBSITE: WWW.JEFFPARISH.NET



JEFFERSON PARISH

DEPARTMENT OF PURCHASING

CYNTHIA LEE SHENG
PARISH PRESIDENT

RENNY SIMNO
DIRECTOR

book and to return it to its proper place on the library shelves. The classification system is used in 200,000 libraries in at least 135 countries.

In terms of call numbers, for nonfiction we use Dewey numbers with max five (5) spots behind the decimal in adult, three (3) in children, and then the first three (3) of the author's last name or of the title if there is no 100 field for author. For fiction, it is a genre designation (selected by the library) and then the first three (3) letters of the titles or author. All call numbers are assigned by the vendor based on these specifications; they are not set by the library during the ordering process.

In terms of cataloging, an OCLC MARC record is preferred. If an OCLC MARC record is not available, the vendor MARC record should be included at minimum ISBN (020), call number (082/092), author (100), title (245), format (300) and publishing information (260), subject headings (6XX), and additional contributor information (7XX), if needed.

- For which collections does Jefferson Parish Library assign a Cutter Sanborn cutter?
Biographies and collective biographies.
- Do you require your vendor to access your Symphony database to identify existing records and local call numbers?
No, we do not.
- Is your Symphony system Z39.50 enabled so that a vendor is able to access your database to view existing MARC records and local numbers?
Not currently.
- Do you currently load MARC and item record files provided by a vendor?
Yes, we do.
- Will the library accept a vendor's full-level MARC record customized to meet your local cataloging practices?
Yes, we will.
- Does the library require the vendor to update holdings with OCLC?
No, we do not.

4. Please provide additional information about the use of BISAC –

- Pages 20 - 21 under Processing – item 21 – BISAC Subject labels and b) under Cataloging – item 26 – BISAC Subject Headings.

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JEFFERSON PARISH

DEPARTMENT OF PURCHASING

CYNTHIA LEE SHENG
PARISH PRESIDENT

RENNY SIMNO
DIRECTOR

- Does the library or the vendor select the appropriate BISAC Subject Heading?
The Vendor does the Subject Heading.
 - Which level of the BISAC Subject Heading do you use?
We use level one (1).
 - If no publisher assigned BISAC Heading exists, is the vendor required to analyze the book to determine the appropriate BISAC Subject Heading?
Yes, the vendor would be required to determine the appropriate BISAC Subject Heading.
 - Do you have a closed list of BISAC subject labels that you use?
Yes.
 - Does the 949-item field contain a BISAC designation in the call number field?
No, only one (1) of our 16 branches uses this, so while it is necessary to be able to provide BISAC Headings for the contract, there are not a large number of items that will require it.
5. Regarding Part 1, Item 1.15 – Performance Bond, is the stated performance bond required of those who are named both primary and secondary vendor?
Performance Bond will be required by both primary and secondary vendor.
6. If the secondary vendor is required to provide a Performance Bond, will they be required to bond for the same full amount as primary or could a lesser amount be negotiated based upon the volume of material to be supplied by the secondary vendor?
The same performance bond amount will be required by both primary and secondary. The performance bond will be required at the signing of the contract.
7. Will the Library accept a conditional offer in which a vendor agrees to the performance bond requirement only if named primary vendor?
The performance bond is set at 50% of the total contract cap and both vendors will be required to provide a performance bond at the signing of the contract. No conditional offers will be considered.
8. What is the Library's anticipated annual budget for the purchase of printed book materials?
Please see the answer to question number one (1).

GENERAL GOVERNMENT BLDG. – 200 DERBIGNY ST., SUITE 4400, GRETNA, LA 70053
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JEFFERSON PARISH

DEPARTMENT OF PURCHASING

CYNTHIA LEE SHENG
PARISH PRESIDENT

RENNY SIMNO
DIRECTOR

Sincerely,

Sidney Duffy

Sidney Duffy, Buyer II
Jefferson Parish Purchasing Department

RFP SUBMISSION:

Proposer must acknowledge all addenda on the signature page. Proposer acknowledges receipt of this addendum on the signature page by entering the number that has been assigned to this addendum.

This addendum is a part of the contract documents and modifies the original RFP documents and specifications. The contents of this addendum shall be included in the contract documents. Changes made by this addendum shall take precedence over the documents of earlier date.

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