



July 17, 2024

Ms. Jessica Herdina  
Assistant Library Director  
Riverside Public Library  
3900 Mission Inn Avenue  
Riverside, CA 92501

**RE: Pricing Proposal – CLS Ongoing Services for Print Material**

Dear Ms. Herdina:

Thank you for allowing Baker & Taylor's Customized Library Services the opportunity to provide a pricing proposal for Ongoing Services for the Riverside Public Library. Our proposal, including a detailed description of our service capabilities, follows this letter.

Our approach is the most comprehensive and technically advanced process in our industry. By using CLS, Riverside Public Library will partner with the industry's premier provider of customized technical services. CLS is the only provider in the industry that truly delivers an adequate scope of material coverage coupled with a complete solution for the cataloging and processing of library materials.

For over 191 years, Baker & Taylor has been serving libraries as the leading distributor of print books, ebooks, digital audiobooks and video products to libraries across the United States. We also provide our customers with value-added proprietary data products and customized management and outsourcing services. With over 14 million product records in our catalog and 800,000 unique skus stocked in our warehouses, we are the industry-leading distributor to libraries. But our work goes beyond product distribution. As a fully independent, minority-owned business, we are wholly committed to partnering with our library customers to improve community outcomes.

Every day, our team of over 1400 library and literacy champions work with purpose, developing innovative solutions to address the challenges libraries face. From improving representation with our Diversity, Equity and Inclusion module to creating a pathway to sustainability with our book recycling program, our team works tirelessly to support our customers. We look forward to providing our dedicated solutions and services to you.

Attached to this proposal is Baker & Taylor's standard Notice of Pricing Proposal Acceptance form. If you are in agreement with the attached proposal, please sign the enclosed form and return it as indicated.

Should you have any questions regarding this proposal, please do not hesitate to contact me at 800-775-7930 ext. 3248. I will be happy to assist you in any way possible. Thank you again for this opportunity.

Sincerely,

*Jennifer Rhyne*

Jennifer Rhyne  
Director, Pricing Services  
Baker & Taylor, LLC  
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Charlotte, NC 28217  
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## COMPANY HISTORY

Baker & Taylor began in 1828 as a Hartford, Connecticut bindery and subscription book publisher. Founders, David Robinson and B. B. Barber, then opened a bookstore to distribute their own and other publisher's materials. Seven years later, Robinson and Barber moved their rapidly growing business to New York City. In 1885, James S. Baker and Nelson Taylor acquired the company, which was now focused on the distribution of other publisher's materials. In 1912, Baker & Taylor discontinued publishing altogether and devoted itself entirely to the wholesaling of all types of library materials. In 1970, W.R. Grace & Co. bought Baker & Taylor. During the '70's and '80's, Baker & Taylor experienced significant growth, increasing our market share and providing greater breadth of services to all consumers and markets.



Baker & Taylor senior management and the Carlyle Group, acquired Baker & Taylor in 1992. In July of 2003, Willis Stein & Partners acquired Baker & Taylor and in June of 2006, Castle Harlan, LLC. acquired Baker & Taylor. In 2016, Follett Corporation announced their acquisition of Baker & Taylor and retained ownership until 2021. In November 2021, Follett announced the divestiture of Baker & Taylor to a private investor group led by CEO and President, Amandeep Kochar.

Baker & Taylor has a long-standing tradition of being the "any book" wholesaler. We are a leading full-line distributor of books and audiovisual products to library facilities, with annual sales of more than 67 million books from over 75,000 publishers and imprints. The oldest book distributor in the United States, Baker & Taylor has provided economical pricing and excellent services for over 190 years. Our contacts and experience in the library marketplace have enabled us to establish the most comprehensive coverage of materials and range of services in the industry. We supply all categories of materials for all levels of library patrons, including general adult readers, researchers, professionals, and Children and Teens. In addition to items that are stocked in our distribution centers, we maintain a product database that contains over 14 million items.

## DESCRIPTION OF SERVICES

### CUSTOMIZED LIBRARY SERVICES

Baker & Taylor has been leading the industry in providing libraries customized technical services for over forty years. We have developed a multitude of innovative services in the area of collection management, cataloging services and technical processing. Due to technological advances and the increased complexity of library operations and projects, Baker & Taylor created Customized Library Services in 1996 to consolidate our valuable resources and experience in order to address the growing demand from libraries for more customized, specialized and unique services. CLS is a separate operating unit, whose sole focus is Opening Day Collections (ODC), Collection Expansions, Online Cataloging Solutions, Outsourcing Projects and Project Management. CLS has its own staff of over 300 trained professionals to perform the unique services to provide complete library solutions. We currently serve over 400 libraries on an ongoing basis and complete over 75-100 ODC/Collection enhancement projects per year.

### PROJECT SCOPE

Customized Library Services is fully capable of providing customized cataloging and processing services required by the Riverside Public Library. In accordance with the library's completed requirements, the following services will be provided:

- CLS will provide customized adaptive and copy cataloging with CIP upgrades where needed utilizing Z39.50 protocol
- CLS will provide Project Management Support

- CLS will provide custom cataloging and processing of Ongoing Material

The basis of Customized Library Services' business relationship with Riverside Public Library will be a partnership, based on mutually agreed upon roles, responsibilities, and obligations. Flexibility and responsiveness to changing needs are fundamental requirements for ensuring a successful and mutually satisfying partnership between the Library and CLS.

#### PROJECT MANAGEMENT APPROACH

The formation of Baker & Taylor's Customized Library Services brought with it the development of a project-oriented approach to Ongoing Collection Development, Opening Day Collections, and Ongoing Online Cataloging and Processing. This approach allows CLS management to schedule all facets of a project or ongoing service, including resources, and provides the foundation and framework for the entire project while creating a mutual understanding of the requirements of both the Library and CLS.

The first step in the implementation of the CLS project management process is the establishment of a project team. All CLS project teams consist of a minimum of a project manager, collection development manager, an automation specialist/cataloging/processing manager, and an account coordinator. Team members are responsible for managing their assigned resources to complete the project. In turn, each team member works closely with the project manager to ensure compliance to all requirements.

The development of the project team begins upon receipt of a completed Customer Needs Assessment or formal/informal proposal request. The project team immediately becomes part of the CLS response team and helps develop an approach that will successfully complete the project and meet the library's requirements. This process ensures that all management resources are in place prior to the submission of our response. Our experience has shown that when the library sets up a project team with similar project responsibilities and scope in advance of the project or ongoing service startup, the documentation and implementation of services is more efficient, accurate, and thorough. Additionally, the library's internal project team, supported by a designated library project manager, can provide a central point of contact for all issues and information. This will help foster communication and insure that all internal library timelines and schedules are met.

Upon successful award to CLS, the project manager immediately contacts the library's project coordinator to begin developing the partnership that will carry throughout CLS service to the library or the projects' completion. At this time, the project manager contacts the library to review the next steps in the process and possible site visit dates and also requests samples of barcodes, genre labels, ownership labels or other labels as applicable. The project manager will work with the library to schedule a series of conference calls, including the appropriate CLS and library project team members. The goals of these calls will be to establish connectivity to the library's catalog, review the cataloging and processing specifications supplied in the proposal process and further define them if needed, profile any collection development needs, and assist in the coordination of any electronic ordering/account set up. At the end of these conference calls, all CLS project team members will review their notes and provide a comprehensive requirements documentation package to the library. Upon receipt of the library's approval of the requirements package, CLS will create cataloged and processed samples.

Your project manager will deliver these samples to the library, giving the library another opportunity to confirm that CLS understands their requirements. At this time the project manager can walk the library through placing their first orders and discuss a fulfillment schedule with the library.

Ultimately, the key to successful project management is communication. Internally, CLS emphasizes and focuses on team communication for facilitation and completion of all processes and tasks. Externally, this communication is no less important. Team to team communication between the library and CLS builds a confidence and the environment that is needed for the successful completion of any project. In support of this "communications environment", the project manager is responsible for establishing regular

conference calls with the library and all the CLS team members. These meetings can serve a number of purposes, such as the regular review of profiles, requirements, and project status updates. Our experience has also proven that these meetings and calls aid in the development of the relationship between CLS and the library by promoting open lines of communication at all times and by helping to resolve any issues or questions to the mutual satisfaction of the library and CLS.

A final component of project management is consulting support. All CLS project managers have significant project and delivery experience that can provide ongoing support and aide to the library. This additional knowledge base is free of charge and comes from working with seasoned project professionals. This support can be an invaluable and timely tool from collection development strategy all the way to the delivery implementation.

### **CATALOGING**

Customized Library Services' custom cataloging is Baker & Taylor's premier service. CLS has performed online cataloging, editing and maintenance for Libraries since 1989. Our preferred method is to access the Library's ILS using the Z39.50 protocol. Customized Library Services leverages Z39.50 protocol for accessing the library's database and a resource pool of records from the Library of Congress and any Baker & Taylor created records. This technology allows our CLS catalogers to have access to the most current version of the library's cataloging records without the overhead of being directly online. Records obtained from the Library's database are saved to a library specific work file located in our secure cataloging utility. The records in the work file are used in the creation of spine labels and as a vehicle for providing item-linking information.

### **Major Features of the CLS Preferred Cataloging Methodology (Z39.50):**

Only authorized CLS catalogers have access to the library's database and work file. The cataloger will process material first by searching for a matching record in the library's database and work file simultaneously.

A successful search occurs when our cataloger matches the data elements found in the appropriate record tags. CLS considers the title, author, imprint/publisher, edition and date of publication when matching a record. During the CLS profiling, the project team will document the appropriate attributes for matching records. When a matching record is found, the appropriate item level information (examples: barcode number, list price, collection code, etc.) is keyed and the record is saved to the library's work file.

If a record is not found in the library's database or work file, the CLS Bibliographic Database is searched, followed by LC MARC and the resource databases of BTCat. The CLS Bibliographic Database contains all CIP records upgraded to full MARC standards by CLS catalogers, as well as new records created by CLS original catalogers.

If the record is not found in the above resources, the Library may also choose to have CLS search OCLC on their behalf for records not found in the library's catalog. Once a record is located in OCLC it is saved to the Library's work file and the record is updated to the Library's specifications. The option of utilizing OCLC will also help to minimize the Library's need for original cataloging. Please note that the process of using OCLC is available upon CLS' receipt of a signed third-party agreement which grants permission to our catalogers to access OCLC on the library's behalf. There are no additional charges from CLS for this service. However, it should be noted that all corresponding OCLC charges will be the responsibility of the Library. On a weekly basis, an electronic file is sent to OCLC to update the library's holdings for all contributed records.

When a full matching record is found in one of the resource databases, it is upgraded to meet the library's specifications and the appropriate item tag is keyed. The record is then saved to the library's work file.

If the matching record found is not a full level record, the record is upgraded to meet LC standards and is saved to the CLS Bibliographic Database. The record is then further edited to meet the library's specifications and the appropriate item record is keyed. The record is then saved to the library's work file. The exception to a full level record would be that some AV pre-pub records are not upgraded to full MARC standards. However, these records are upgradeable to the Library's local standards. If a matching record cannot be found in the multi-database search string, a request is forwarded to an original cataloger in the CLS department. Our original catalogers will create a record according to RDA rules. LC authority files are used to validate author and subject headings. Once the record is created, it is saved into the CLS Bibliographic Review File. Once the record has been reviewed and approved, it is saved in the CLS Bibliographic Database. The library's assigned cataloger is notified, and the record will be edited to meet the library's specification and appropriate item tag is keyed. The sample MARC records are enclosed in Appendix 1.

Every title sent to the library will have a full MARC record with the appropriate item tags. The records will either be new additions to the library's catalog, edited and modified to the library's standards, or existing records from the library's catalog.

When the cataloger has completed the order, laser printed label sets consisting of spine, barcode, bibliographic, and other labels as required by the library are printed. We have enclosed a sample label set in Appendix 2. The barcode is provided in a standard format, with an eye readable number strip available. All other labels are customizable for font, pitch, boldness and italics. Options for label font include Courier, Times New Roman and Arial and pitches 12, 14, 16 and text can be left justified or centered. For thin books, we can provide one line spine labels and for Picture Books we can provide a larger font author letter spine label. The library will supply a unique barcode range, barcode prefix, and symbology information.

Call number and bibliographic information is extracted directly from the MARC record to ensure accuracy. After the labels are printed, a file of MARC records corresponding to the titles in the order is created. Released records are flagged so they cannot be selected again.

The file of records will be put on the B&T FTP server for the library to retrieve and load. The records are maintained on the Library's work file for historical reference.

### PROCESSING

The CLS department has over 300 trained professionals staffed to handle the library's customized requirements. These staff members are dedicated to meeting the library's requirements and exceeding your expectations. Our commitment to excellence and doing the job right the first time is unmatched in our industry. After cataloging is complete, the processing department completes the physical processing of each item. The processors review the processing instructions gathered at the site visit. Following these instructions, the processor attaches the spine label, barcode, and any special labels required by the library. After the application of all physical components, the library's materials move to the jacket selection area. Experienced technicians size the books so the appropriate Mylar jacket can be applied to the dust cover of the book. After the material is fully processed, it is ready for the final and most important stage in our CLS process, back audit.

### **RFID**

CLS Shelf Ready Processing can also include the application and linking of RFID tags. Baker & Taylor's Customized Library Services has been providing RFID services for print and audiovisual material since 2001 and have linked, printed and/or applied tags for millions of items. As the number of vendors and product offerings has grown with regard to RFID technologies, CLS too has grown in our vendor relationships and linking and application capabilities. We currently work with 3M, Arcus, Bibliotheca, Envisionware, FE Technologies, ITG, Lib Convert, Libramation, MKStaff, PV Supa and Tech-Logic. As this is a developing technology with unlimited potential for library use, Baker & Taylor's Customized Library Services will continue to support the needs and requirements of our customers.

## **Back Audit**

The back audit team is the final step in ensuring the material we ship to the library is of the highest quality and is in compliance with the library's profiled specifications. The CLS back auditors inspect each order by cross referencing the completed processing and the processing instructions gathered at the site visit. Once the library's material passes this stage, the order is ready to be staged for delivery to the library.

## **INVOICES**

### **Book and Spoken Word Audio**

Baker & Taylor's book and spoken word invoices include the bill to address, ship to address, unit price, unit discount, quantity, total discount price, ISBN and purchase order number. The library may choose the order in which books appear on the invoice; in the same order as the original purchase order, alphabetically by title, author, or publisher. Cataloging and processing charges can be included in each line's extended price, summarized at the bottom of each invoice, or shown on a separate invoice. In addition, Baker & Taylor's ATS number (authorization to ship) is included on each invoice and packing slip and will allow the library to match the packing slips to invoices.

## **ONLINE CUSTOMER SUPPORT**

Online Customer Support (OCS) is Baker & Taylor's web-based account management system. Access to the OCS system via your web browser is available 24 hours a day, 7 days a week to search and view account information, orders, and invoices with Baker & Taylor.

OCS' sophisticated search options include the ability to query orders by Purchase Order, B&T Order Number, Order Date Range, and more. The OCS data is updated to reflect the latest order and invoice status, as well as up to six months of history.

The library can obtain updated status information at any time by accessing OCS. A backorder summary report including information on all backordered and cancelled titles is available. The library can go to the reports/downloads tab to request this report, setting date parameters and selecting all accounts or specific ones. The report is emailed to the library within 24 hours.

The Library can also view detailed information on order and account status, warehouse location, quantities and prices, and shipping details. If a shipping carrier, such as UPS, has external tracking capabilities, a link in the OCS system will take the Library directly to the carrier's website where additional information on your shipment's status is available. There is even an option that helps the Library to print invoices and order details for record keeping.

## **PAYMENT TERMS**

Baker & Taylor's payment terms are net 30 days from the date of invoice.

## **SHIPPING**

Baker & Taylor will send all items Free Shipping, FOB Destination with inside delivery.

Staff accounts, offered as a courtesy to our customers for personal use, will receive FOB Shipping Point, Charge Shipping, and will be taxed as appropriate.

A transportation surcharge of 2.0% per invoice total (excluding cataloging and processing fees) for books and spoken word audio materials will appear as a separate line item on each invoice.

## PRICING PROPOSAL

### PRINT MATERIAL

Based on the information provided, we are pleased to propose the following pricing for **print material**. Baker & Taylor/CLS reserves the right to adjust pricing if the Library's requirements change at any time throughout the project. Pricing is based upon the library's currently revised specifications. Should the library require additional services in collection development, cataloging, processing, reporting, storage, or shipment, Baker & Taylor/CLS may adjust pricing accordingly. If the library system cannot be accessed via our Z39.50 methodology, then CLS may discuss alternative methodologies for system and shelf ready material. It should be noted that the cost for an alternative methodology other than what is outlined within this proposal, would be different than the pricing quoted below. All items will be supplied by CLS unless otherwise noted:

**PRINT ONGOING COLLECTION SERVICES.....\$3.95/UNIT**

INCLUDES:

1. ADAPTIVE AND COPY CATALOGING WITH CIP UPGRADES WHERE NEEDED, UTILIZING Z39.50 PROTOCOL
2. ITEM LINKING
3. PROJECT MANAGEMENT SUPPORT
4. MYLAR JACKET
5. LABEL PROTECTORS
6. SPINE LABEL
7. GENRE/COLLECTION LABELS
8. BARCODE(S)
9. LINK AND AFFIX BAKER & TAYLOR SUPPLIED UNIVERSAL RFID TAG

### **ADDITIONAL SERVICES AVAILABLE UPON REQUEST:**

#### **LAMINATE PAPERBACK COVERS (ADDITIONAL)**

10 MIL CLEAR POLY .....\$2.15/UNIT

7 MIL CLEAR POLY .....\$2.05/UNIT

**ORIGINAL CATALOGING .....\$10.00/TITLE**

- ◆ FOR THOSE RECORDS WHERE CATALOGING IS NOT AVAILABLE IN THE LIBRARY'S DATABASE OR B&T'S CATALOGING UTILITY, CLS WILL PROVIDE AN ORIGINAL CATALOGING RECORD FOR \$10.00/TITLE. TITLES REQUIRING ORIGINAL CATALOGING WILL BE PRICED SEPARATELY AT \$10.00/TITLE FOR THE FIRST COPY OF EVERY TITLE ORDERED. IF MULTIPLE COPIES OF A TITLE ARE ORDERED, THE \$10.00 CHARGE WILL ONLY APPLY ONCE, HOWEVER, THE COMPREHENSIVE CATALOGING AND PROCESSING CHARGE WILL APPLY TO EACH UNIT INCLUDING THE INITIAL UNIT THAT RECEIVES THE \$10.00 CHARGE.



## TITLE SOURCE 360™ SUBSCRIPTION

Baker & Taylor's The Title Source 360™ is the most extensive database of bibliographic acquisitions information for U.S. publications. This subscription database includes book, spoken word audio, DVD, and music CD titles. Each record gives current print status (i.e. Not-Yet-Published, Out-of-Print), in-stock availability, and latest list price. Title information is updated daily.

Our database contains over 7 million book titles, 190,000 DVD titles, and 700,000 music titles. Data elements include: Annotations from LC and B&T publications, digitized cover images, 45 key search indices (including LC and Dewey classes), eleven filter criteria (including stock status, publication date, binding, format, and grade level), and duplicate checking between orders and selection carts.

Baker & Taylor's Title Source 360™ is a revolutionary new way to order product from one trusted source. Through the latest innovative technology, Title Source 360™ provides users with fast, accurate and personalized search results, and makes ordering easier than ever. Find the products you need and order them quickly and easily with a streamlined checkout process.

### Title Source 360™ Benefits:

- Largest database of book titles and media products
- Fast, customized search results based on prior searches or user profile
- Intuitive interface
- Inventory view and title searching within cart
- Product release calendar
- Special offers and promotions
- Live customer support
- Customized profiles
- Streamlined order management
- Simple batch entry upload and ordering process

Users under the same Administrative umbrella may create, transfer, and share multiple carts for ease of selection.

## DISCOUNT TERMS AND CONDITIONS OF SALE

Baker & Taylor, LLC

### Discount Terms and Conditions of Sale (FIRM ORDER BOOK and SPOKEN WORD AUDIO)- Riverside Public Library (CA)

Baker & Taylor, LLC is pleased to offer the discount terms and conditions listed below. The pricing grid below provides discounts for each product category offered by Baker & Taylor.

Product Category	Category Definition (a), (f)	Price Indicator (f)	Discount (f)	
I.	Adult Trade Hardcover Editions (Popular Fiction & Non-Fiction, and may include some spoken word audio; see also Product Category IX for exceptions)	O1 - (zero one) (Adult Hardcover Trade Editions) C - (Hardcover Computer Books)	O1 = 46.5 % C = 46.5 %	
II.	Juvenile Trade Hardcover Editions (Popular Fiction & Non-Fiction; see also Product Category IX for exceptions)	J1	J1 = 46.5 %	
III.	Adult Quality Paperback Editions (Popular Fiction & Non-Fiction; see also Product Category IX for exceptions)	B - (Paperback Trade Editions) C - (Paperback Computer Books)	B = 40.5 % C = 40.5 %	
IV.	Juvenile Quality Paperback Editions (Popular Fiction & Non-Fiction; see also Product Category IX for exceptions )	G	G = 40.5 %	
V.	Mass Market Paperback Editions; see also Product Category IX for exceptions	P	P = 40.5 %	
VI.	Single Edition Reinforced (Juvenile; see also Product Category IX for exceptions)	R	R = 23.0 %	
VII.	Publisher's Library Edition (Juvenile; see also Product Category IX for exceptions)	Z	Z = 23.0 %	
VIII.	University Press Trade Editions (may be of any product category or binding type and include some spoken word audio; see also Product Category IX for exceptions)	A	A = 23.0 %	
IX.	Text, Technical, Reference, Professional Medical, Small Press, some University Press titles (excluding University Press Trade Editions); publishers whose titles have limited sales volume; Titles of Limited Demand (may be of any product category or binding type or publisher of origin and may include some spoken word audio); certain Adult Trade Hardcover Editions and Juvenile Trade Hardcover Editions	S/X/N - (Text, Technical, or Reference Editions)  L - (Hardcover Editions from Small Press, publishers whose titles have limited sales volume, and Hardcover Titles of Limited Demand—primarily Adult)  7 - (Hardcover Titles of Limited Demand—primarily Juvenile)  M - (Paperback Editions from Small Press, publishers whose titles have limited sales volume, and Paperback Titles of Limited Demand—primarily Adult)  1 - (Paperback Titles of Limited Demand—primarily Juvenile)  T/U/V/W/4/Letter O - (Specialty Textbooks) 5/6/8 - (Professional Medical Titles)  O2 (zero 2) - Adult Trade Hardcover Editions having below average publisher list price titles in Category I	S = 10.0 % X = 10.0 % N = 0.0 % (b)  L = 10.0 % (c)(d)  7 = 23.0 % (d)  M = 10.0 % (c)(d)  1 = 23.0 % (d)  T = 0.0 % U = 10.0 % V = 0.0 % W = 0.0 %	4 = 10.0%  Letter O = 10.0 %  5 = 0.0 % 6 = 10.0 % 8 = 10.0 % O2 = 46.5 %  J2 = 46.5%
X.	Imported English and Non-English Language Editions; see also Product Category IX for exceptions	F/K/3	F = 0.0 % K = 0.0 % 3 = 0.0 %	
XI.	Enhanced Service Program	Y / Q	Y = 0.0 % + \$4.95/unit (e) Q = 0.0 % + \$4.95/unit (e)	

XII.	Spoken Word Audio; see also Product Category IX for exceptions	H	H = 45.0 %
XIII.	Board Books; see also Product Category IX for exceptions	I	I = 40.5 %
XIV.	Novelty Items/Activity Books; see also Product Category IX for exceptions	I	I = 40.5 %
XV.	Special Programs, such as: - PawPrints Editions - Turtleback Editions - VOX Books	D E All VOX Books	D = 0.0 % E = 0.0 % 0.0%

### ENDNOTES

- (a) Please see Attachment B for full category definitions, which are attached hereto and incorporated herein by reference. Materials produced for print-on-demand services may fall into any category.
- (b) Titles which receive minimal publisher discount will be invoiced at the publisher's list price, unless otherwise indicated.
- (c) Represents publishers with limited sales volume, based upon a semi-annual review. These titles may be of any product category or binding type or publisher of origin.
- (d) Represents individual titles which do not qualify for preferred stock status (based upon a quarterly review) and individual titles which qualify for preferred stock status, but have limited demand (calculated over a rolling 12 month period). These titles may be of any product category or binding type or publisher of origin.
- (e) Titles where Baker & Taylor receives no discount from the publisher or prepayment is required by the publisher or publishers whose titles have limited demand and/or non-commercial publishers will be invoiced at list price plus a service charge of \$4.95/unit.
- (f) Please note the following:
- Except where otherwise noted, book discounts are applied to current publisher's list price at the time of shipment. Publisher's list price is subject to change without notice.
  - Baker & Taylor reserves the sole right to be the final determinant of product categories, category definitions and price indicators. The discounts vary based on this determination.
  - Titles are categorized by Baker & Taylor for pricing purposes by considering the binding, general marketing categories, demand for certain titles, preferred stock status, cost of acquisition, cost of distribution, average publisher's list price, and the size or type of publisher, as well as factors related to relationships with publishers such as shipping terms, payment terms, publisher's discount, returnability to publishers and other factors.
  - Product categories, category definitions and price indicators are subject to change at Baker & Taylor's sole discretion, without notice, based upon the above-described factors for categorizing titles.
  - For domestic titles where no publisher list price is assigned by the publisher, Baker & Taylor will assign such titles a price in its electronic catalog which is based upon Baker & Taylor's estimate of market conditions.
  - For imported titles where no publisher list price is assigned by the publisher for the U.S. market, Baker & Taylor will assign such titles a U.S. dollar price in its electronic catalog which is based upon Baker & Taylor's estimate of market conditions.
  - For PawPrints editions, Baker & Taylor will assign such titles a price in its electronic catalog which is based upon Baker & Taylor's estimate of market conditions. For VOX Books, the list price shown is the price assigned by Library Ideas.
  - Titles of limited demand or from small or specialty publishers generally are included in Product Category IX or Product Category XI. Titles of limited demand may be of any product category or binding type or publisher of origin and include some spoken word audio.
  - The discount terms and conditions in this Attachment A do not apply to Baker & Taylor's Continuation Services or Approval Programs.
  - Except where otherwise noted, Baker & Taylor provides an invoice that identifies the publisher's current list price at the time of shipment, the discount offered, and the exact price charged for each title ordered.
  - Price Indicators and estimated sales price by title are displayed in Baker & Taylor's online ordering system, Title Source 360.

### Category Definitions

(Please see Attachment A for discount terms and conditions of sale, discount pricing grid and Price Indicators.)

- I. Adult Trade Hardcover Editions (Price Indicators 01, C)**  
High demand materials from widely distributed publishers designed for the general consumer, usually dealing with a subject matter having broad mass appeal, and may include some spoken word audio materials and computer books. These titles are typically released in hardback and can be either fiction or current non-fiction. Publisher promotional/media expenditures and print runs are customarily higher for these titles than for most others. Inventory is maintained with preferred stock status (regularly stocked in major warehouses). See also Product Category IX for exceptions.
- II. Juvenile Trade Hardcover Editions (Price Indicator J1)**  
High demand, juvenile materials from widely distributed publishers designed for the general consumer, usually dealing with a subject matter having broad mass appeal. These titles are typically released in hardback and can be either fiction or current non-fiction. Publisher promotional/media expenditures and print runs are customarily higher for these titles than for most others. Inventory is maintained with preferred stock status (regularly stocked in major warehouses). See also Product Category IX for exceptions.
- III. Adult Quality Paperback Editions (Price Indicators B, C)**  
High demand paperback materials from widely distributed publishers, other than the standard rack size paperback, typically found in bookstores and other retail outlets, and may include some computer books. Inventory is maintained with preferred stock status (regularly stocked in major warehouses). See also Product Category IX for exceptions.
- IV. Juvenile Quality Paperback Editions (Price Indicator G)**  
High demand, juvenile paperback materials from widely distributed publishers, other than the standard rack size paperback, typically found in bookstores and other retail outlets. Inventory is maintained with preferred stock status (regularly stocked in major warehouses). See also Product Category IX for exceptions.
- V. Mass Market Paperback Editions (Price Indicator P)**  
A standard rack size paperback typically found in bookstores or other retail outlets. See also Product Category IX for exceptions.
- VI. Single Edition Reinforced (Price Indicator R)**  
A high quality binding designed to provide a long shelf life in a heavy use environment. Although the binding is fanned and glued it may not be sewn, which is typically found in the publisher library edition. Subject content can include both fictional and non-fiction works appealing to juveniles as well as adults. These bindings are identified by the publisher to Baker & Taylor. See also Product Category IX for exceptions.
- VII. Publisher Library Editions (Price Indicator Z)**  
Fiction as well as non-fiction materials appealing to both juveniles and adults, designed with the rugged durability required of the environment typically found in a library setting. Publisher Library Editions are traditionally of the highest quality, usually fanned, sewn and glued to provide the greatest possible shelf life of any binding. These bindings are identified by the publisher to Baker & Taylor. See also Product Category IX for exceptions.
- VIII. University Press Trade Editions (Price Indicator A)**  
This category would include any University Press Trade Editions, both adult and juvenile, may be of any category product or binding type, and may include some spoken word audio materials, and are subject to publisher reclassification. See also Product Category IX for exceptions.
- IX. Text, Technical, Reference, Small Press, Titles of Limited Demand, and certain Adult Trade and Juvenile Trade Hardcover Editions (Price Indicators S, X, N, L, M, V, T, U, W, Letter O, 1, 4, 5, 6, 7, 8, 02 (zero 2), J2)**  
Category of materials includes, but is not limited to, text, technical, reference, professional medical, small press, and some university press titles (excluding University Press Trade Editions). It includes titles purchased from publishers on a non-returnable basis, those publishers that extend little discount to Baker & Taylor, and publishers whose titles have limited sales volume based upon a semi-annual review. It includes individual titles which might otherwise fall under different category definitions but are in this category as Titles of Limited Demand because they either do not qualify for preferred stock status (based upon a quarterly review) or do qualify for preferred stock status, but have limited demand (calculated over a rolling 12 month period). Additionally, any publisher which is not in compliance with some of Baker & Taylor's purchasing requirements could be in this category. Materials in this category are both adult and juvenile, may be of any product category or binding type or publisher of origin and may include some spoken word audio materials. It includes Adult Hardcover Trade Editions having below average publisher list price titles in Category I, and Juvenile Trade Hardcover Editions having below average publisher list price titles in Category II.
- X. Imported English and Non-English Language Editions (Price Indicators F,K,3)**  
Titles produced and distributed outside of the domestic US. These titles may be of any category product or binding type and represent various publishers. See also Product Category IX for exceptions.
- XI. Enhanced Service Program Titles (Price Indicators Y,Q)**  
This category includes materials where Baker & Taylor receives no discount from the publisher, or prepayment is required by the publisher, or publishers which have restrictions on returns, or books of small or non-commercial publishers with limited sales volume based upon a semi-annual review. Any publisher which is not in compliance with Baker & Taylor's purchasing requirements would be in this category. Materials in this category may be of any product category or binding type. These titles will receive no discount and are subject to a service charge. Enhanced Service Program Titles may carry different discounts, as shown by Price Indicators Y, Q in Attachment A.
- XII. Spoken Word Audio (Price Indicator H)**  
Materials designed for the general consumer, usually dealing with a subject matter having broad mass appeal. These titles can be either fiction or current non-fiction. See also Product Category IX for exceptions.
- XIII. Board Books (Price Indicator I)**  
Durable materials from widely distributed domestic publishers designed for young children; pages are manufactured of heavy gauge cardboard to prevent tearing. These editions typically feature few pages, simple themes and colorful illustrations or photographs. See also Product Category IX for exceptions.
- XIV. Novelty Items/Activity Books (Price Indicator I)**  
Specially packaged gift set or novelty item related to a book product or attached as an accessory to a book product. These items would include a book with toy, rag books, washable cloth books, books with accessories or kits, electronic sound books, sticker books, tracing books or coloring books. This category also includes any non-book merchandise such as model kits, hobby kits, flash cards or jigsaw puzzles. See also Product Category IX for exceptions.
- XV. Special Programs (Price Indicators D, E)**  
Programs, formats, or editions offered only by Baker & Taylor or not included in any other category. These programs include but may not be limited to PawPrints editions, Turtleback editions, and VOX Books.

## ENHANCED SERVICES PROGRAM

Baker & Taylor is pleased to offer a service that will save your library time and money when procuring titles from small and hard to find publishers. By utilizing B&T's vast publisher and title database, the library can purchase a wide variety of low demand and small print run titles from associations and limited edition, prepayment, and non-returnable publishers.

Baker & Taylor's Enhanced Services Program provides the library with access to millions of active book titles representing over 66,000 imprints. This breadth of coverage is greater than that of any other book industry wholesaler.

The "ESP" program builds on B&T's already outstanding publisher relations by:

- Expanding our vendor relations team responsible for the follow-up of all publisher orders, improving the speed of delivery of all titles to the library;
- Widening our publisher base to include hundreds of small non-commercial publishers formerly considered apply direct by the book industry; and
- Increasing our reporting capabilities by providing order status reports for 100% of all titles not yet published and by supplying anticipated publication release dates for all out-of-stock items.

This category includes material where Baker & Taylor receives no discount from the publisher or prepayment is required by the publisher or books of small, limited in demand and/or non-commercial publishers. Any publisher which is not in compliance with Baker & Taylor's purchasing requirements would be in this category. Materials in this category may be of any binding. These titles will be invoiced at list price plus \$4.95/unit service charge.

For libraries concerned about purchasing these types of titles, B&T's Title Source 360™ can assist the librarian in researching a particular item's category and format. Surcharge titles will appear with a Y or Q in the discount code field. Additionally, you may contact your Customer Service representative or Information Services via phone, fax, or email ([btinfo@baker-taylor.com](mailto:btinfo@baker-taylor.com)) to determine surcharge titles before placing an order.

As a convenience to the library, B&T can exclude these titles from all orders by adjusting your account profile setup. Please contact your Customer Service Representative for additional information.

### INSTITUTIONAL RETURNS

(Revised July 2015)

The following guidelines are required to ensure prompt handling of your return. All product returns (**excluding Book Leasing programs**) require prior authorization from a Customer Service Representative. ***You may contact your appropriate representative via the toll-free number listed on your packing list.***

#### *How to Obtain Return Authorization*

Please use the Return Authorization Form from your shipment's packing list to make all returns. Contact your Customer Service Representative for return authorization. ***All claims must be made within 45 days from the date of invoice.***

1. When calling for return authorization, please have the following information available:
  - A. Return Authorization Form
  - B. Your account number and ATS# from the shipment's packing list (located mid-page under the Return Authorization Form explanation)
  - C. Reason for the claim/return
  - D. Action being requested -
    1. Replacement of product
    2. Credit to your account; no replacement product necessary
2. Your Customer Service Representative will assign your return an authorization number (RTA#). To expedite the process, please clearly mark the RTA# on the Return Authorization Form and on the outside of the carton in the upper right corner from the shipping label.
3. Make your return via an insured and traceable carrier; Baker & Taylor is not liable for returns lost in transit.
4. ***Products incorrectly shipped by Baker & Taylor may be returned with authorization within 45 days of the product's date of invoice.*** Product(s) meeting the definition of Publisher defective may be returned with prior authorization within six months of the product's date of invoice. Products purchased with value-added processing services which have been shipped as ordered are considered non-returnable.

**DAMAGED SHIPMENTS:** If you receive a damaged carton(s) which resulted in damaged product(s), please hold the product(s) and save the carton for Carrier inspection. If the damage is visible at the time of delivery, bring it to the Carrier's attention and note it on the Bill of Lading. Then, contact your Baker & Taylor Customer Service Representative via the toll-free number listed on the packing list.

**CLAIMING SHORTAGES:** Please check your packing list or invoice before claiming shortages. ***All claims must be made within 45 days from the product's invoice date.*** Please ensure you have received all cartons of a shipment prior to signing for receipt from the Carrier. Cartons you have signed for as received from the Carrier are not claimable as shortages from Baker & Taylor.

**INTERNATIONAL CUSTOMERS ONLY:** For information on making returns of damaged, defective, or incorrect products, please contact your local International Sales Office or our International Customer Service Department ([internationallibrarycustomerservice@baker-taylor.com](mailto:internationallibrarycustomerservice@baker-taylor.com)). You may also refer to the website [http://www.btol.com/international\\_libraries\\_details.cfm](http://www.btol.com/international_libraries_details.cfm).

All returns should be sent to:  
**Baker & Taylor Returns Center**  
Department R  
251 Mt. Olive Church Road  
Commerce, GA 30599

## APPENDICES

### Appendix 1 - Sample CLS MARC Records

#### Full MARC Print Adult Fiction

=LDR 02495pam a2200457 i 4500  
=001 \2018050881  
=003 DLC  
=008 181101s2019\\nyu\\000\1\eng\  
=010 \a 2018050881  
=020 \a9781250133144 (hardcover)  
=020 \z9781250133151 (ebook)  
=040 \aDLC\$beng\$erda\$cDLC\$dNjBwBT\$dGCmBT  
=042 \apcc  
=043 \an-us-nj  
=050 00\$aPS3618.O838\$bB53 2019  
=082 00\$a813/.6\$223  
=100 1\$aRosenfelt, David,\$eauthor.  
=245 10\$aBlack and blue /\$cDavid Rosenfelt.  
=250 \aFirst edition.  
=264 \1\$aNew York :\$bMinotaur Books,\$c2019.  
=300 \a290 pages ;\$c25 cm.  
=336 \atext\$btxt\$2rdacontent  
=337 \aunmediated\$bn\$2rdamedia  
=338 \avolume\$bnc\$2rdacarrier  
=490 0\$aDoug Brock series  
=520 \aThe next exciting installment in bestselling David Rosenfelt's Doug Brock series. Doug Brock hasn't had it easy since his getting shot in the line of duty as a New Jersey state police officer. Between the amnesia and having to solve two murder cases, it hasn't been the most restful recovery. Now, the cold case department is checking evidence from a murder case Doug was investigating before the accident, but the DNA points to a man Doug eliminated as a suspect... and he remembers none of it. Doug begins to reinvestigate what turns out to be a series of unsolved killings and must retrace his steps to discover why he would have let the suspect go free. What he uncovers may be more dangerous than any case he's faced yet. With Black and Blue, nationally bestselling author David Rosenfelt continues his thrilling new series featuring Doug Brock.  
=650 \0\$aPolice\$zNew Jersey\$vFiction.  
=650 \0\$aMurder\$xInvestigation\$vFiction.  
=655 \7\$aSuspense fiction.\$2gsafd

#### Sample Original Cataloging Record


=LDR 01097nam a2200337 i 4500  
=001 bl2019006820  
=008 190305s2019\\mnua\\j\b\\001\0\eng\d  
=010 \abl2019006820  
=020 \a9781640260757  
=040 \aGCmBT\$beng\$cGCmBT\$erda  
=050 14\$aQL737.M384\$bR53 2019  
=082 04\$a599.2/5\$223  
=100 1\$aRiggs, Kate,\$eauthor.  
=245 10\$aBaby koalas /\$cKate Riggs.  
=250 \aFirst edition.  
=264 \1\$aMankato, Minnesota :\$bCreative Education,\$c[2019]  
=300 \a24 pages :\$bcolor illustrations ;\$c21 cm.  
=336 \atext\$2rdacontent

=337 \\\$anmediated\$2rdamedia  
=338 \\\$avolume\$2rdacarrier  
=490 1\\\$aStarting out  
=520 \\\$aDescribes the physical features and behavior of baby koalas.  
=504 \\\$aIncludes bibliographical references (page 23) and index.  
=650 \0\$aKoala\$xInfancy\$vJuvenile literature.  
=650 \1\$aKoala.  
=650 \1\$aAnimals\$xInfancy.  
=830 \0\$aStarting out (Creative Education, Inc. (Mankato, Minn.)).



Appendix 2 - Sample Label Set

(Not to scale)

1 of 1		356140991 REN9396609A 9781617738340 L4334900000	
MAXWELL		NEW	
		MAXWELL	
Disk in pocket		A pinch of poison / 9781617738340	
YOUR LIBRARY NAME  9 7 9 1 6 1 7 7 3 8 3 4 0		M	YOUR LIBRARY NAME 123 Main Street Any Town, USA 123456 NORTH
YOUR LIBRARY NAME  9 7 9 1 6 1 7 7 3 8 3 4 0			
9 79 16 1773834 0			
YOUR LIBRARY NAME		1/2009	

## NOTICE OF PRICING PROPOSAL ACCEPTANCE

For: **Riverside Public Library**

Proposal Date: **August 8, 2024**

**FOR: PRINT MATERIAL**

Baker & Taylor is committed to providing services to our customers at a level that meets or exceeds their requirements. We have learned through our experience with many successful projects that the key to this high level of service is a mutual understanding of the requirements of both parties involved. Please carefully review the pricing and services noted above. If you approve, please notify us by signing and returning a copy of this acceptance page to the address below. Based on your agreement to the pricing and discounts contained in this proposal and the information gathered during our discovery process, we will proceed with a plan to provide the requested services of the Riverside Public Library.

This pricing agreement is contingent upon mutual approval of all services and pricing by both the library and Baker & Taylor, LLC, and will remain in effect for the period of one year after the agreement date. Baker & Taylor's product discounts and cataloging/processing prices are firm for one year from the date of acceptance. Pricing provided in this agreement is subject to an annual review by Baker & Taylor and discounts and/or prices may be updated by Baker & Taylor with 60 days' notice to the Library.

CLS reserves the right to negotiate price and/or discount adjustments should the library make changes at any time throughout the duration of the project.

**Riverside Public Library  
3900 Mission Inn Avenue  
Riverside, CA 92501**

Signature: \_\_\_\_\_

Title: \_\_\_\_\_

Name: \_\_\_\_\_

Date: \_\_\_\_\_

Please forward to my attention at the address or email indicated below:

Baker & Taylor, LLC  
2810 Coliseum Centre Drive, Suite 300  
Charlotte, NC 28217  
Fax: 704-998-3260  
Email: [bids@baker-taylor.com](mailto:bids@baker-taylor.com)