



Procurement

300 Turner Street NW
North End Center, Ste 2100
Blacksburg, Virginia 24061
P: (540) 231-6221 F: (540) 231-9628
www.procurement.vt.edu

February 6, 2023

WT Cox Information Services
Dana Reeves
201 Village Rd
Shallotte, NC 28470

Dear Dana,

Subject: Contract Renewal Letter

Virginia Tech Contract #: VTS-003-2017
Commodity/Service: Comprehensive Library Serials Services
Renewal Period: 7/1/23 - 6/30/24
Renewal #: (3 of 5) one-year renewal

In accordance with the renewal provision of the original contract, the university would like to renew the contract for an additional term. Please advise concerning your intention by signing in the appropriate space below. A signed copy of this letter should be received in Procurement by 2/28/23.

If allowed by the contract, price adjustments must be requested at the time of renewal in accordance with the contract documents. Price adjustments are not automatic or retroactive and are only implemented upon request by the vendor at the time of renewal.

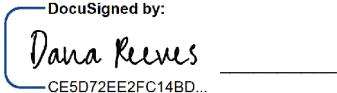
In addition, review the attached form which shows your company information as listed in the university's vendor database. If any of this information has changed, make corrections directly on the form, and return with this letter. It is essential this information be accurate for payments to be processed in a timely manner.

Virginia Tech recommends that our vendors utilize the Wells One AP Control Payment System for payment of all invoices and strongly encourages all vendors under contract with the university to participate in this program. If your firm is not enrolled in the program, refer to our website: <http://www.procurement.vt.edu/Vendor/WellsOne.html> or contact me directly for more information.

Sincerely,

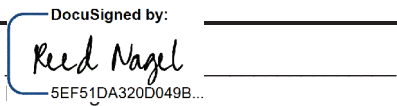
Chad Dalton
Procurement Contract Support Specialist
(540) 231-9129

WT Cox Information Services **agrees** to renew the contract under the terms and conditions of the subject contract.

Authorized Signature:  Date: 2/6/2023
Name: Dana Reeves Title: Vice President of Sales
(please print)

We currently participate in the Wells One Program: _____

We would like to participate in the Wells One Program: X

Approved:  Associate Director for Goods and Services

Date: 2/7/2023



Procurement

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March 17, 2022

WT Cox Information Services

Debra Knox
201 Village Rd
Shallotte, NC 28470

Dear Ms. Knox:

Subject: Contract Renewal Letter

Virginia Tech Contract #: VTS-003-2017
Commodity/Service: Comprehensive Library Serials Services
Renewal Period: July 1, 2022 – June 30, 2023
Renewal #: (2) one-year renewal

In accordance with the renewal provision of the original contract, the university would like to renew the contract for an additional term. Please advise concerning your intention by signing in the appropriate space below. A signed copy of this letter should be received in Procurement by April 25, 2022.

If allowed by the contract, price adjustments must be requested at the time of renewal in accordance with the contract documents. Price adjustments are not automatic or retroactive and are only implemented upon request by the vendor at the time of renewal.

In addition, review the attached form which shows your company information as listed in the university's vendor database. If any of this information has changed, make corrections directly on the form, and return with this letter. It is essential this information be accurate for payments to be processed in a timely manner.

Virginia Tech recommends that our vendors utilize the Wells One AP Control Payment System for payment of all invoices and strongly encourages all vendors under contract with the university to participate in this program. If your firm is not enrolled in the program, refer to our website: <http://www.procurement.vt.edu/Vendor/WellsOne.html> or contact me directly for more information.

Sincerely,

Reed Nagel
Associate Director for Goods and Services/Contracts Office
Telephone: (540) 231-5240

WT Cox Information Services agrees to renew the contract under the terms and conditions of the subject contract.

Authorized Signature: Debra Knox Date: 3/17/2022
Name: Debra Knox Title: Director of Contract Administration
(please print)

We currently participate in the Wells One Program. _____

We would like to participate in the Wells One Program X _____

PQ/

Approved: Mary Helmick Date: 3/17/2022
Mary W. Helmick
Director of Procurement



Procurement

300 Turner Street NW
North End Center, Ste 2100
Blacksburg, Virginia 24061
P: (540) 231-6221 F: (540) 231-9628
www.procurement.vt.edu

January 22, 2021

Debra Knox
WT Cox Information Services
201 Village Rd
Shallotte, NC 28470

Dear Debra Knox:

Subject: Contract Renewal Letter

Virginia Tech Contract #: VTS-003-2017
Commodity/Service: Comprehensive Library Serials Services
Renewal Period: July 1, 2021 through June 30, 2022
Renewal #: (1) one-year renewal

In accordance with the renewal provision of the original contract, the university would like to renew the contract for an additional term. Please advise concerning your intention by signing in the appropriate space below. A signed copy of this letter should be received in Procurement by February 12, 2021.

In addition, review the attached form which shows your company information as listed in the university's vendor database. If any of this information has changed, make corrections directly on the form, and return with this letter. It is essential this information be accurate for payments to be processed in a timely manner.

Virginia Tech recommends that our vendors utilize the Wells One AP Control Payment System for payment of all invoices and strongly encourages all vendors under contract with the university to participate in this program. If your firm is not enrolled in the program, refer to our website: <http://www.procurement.vt.edu/Vendor/WellsOne.html> or contact me directly for more information.

Sincerely,

Roger Gupta, CPPB, CUPO, VCO
Buyer Senior/Contracts Officer
Telephone: (540) 231-4177

WT Cox Information Services **agrees** to renew the contract under the terms and conditions of the subject contract.

Authorized Signature: Debra M Knox Date: 1-21-2021
Name: Debra M. Knox Title: Director of Contract Administration
(please print)

We currently participate in the Wells One Program. _____

We would like to participate in the Wells One Program X

RG/tdj

Approved: Jordan Stump Date: 1/25/2021
Jordan Stump
Interim Assistant Director of Procurement

COMMONWEALTH OF VIRGINIA

STANDARD CONTRACT

Contract Number: VTS-003-2017

This contract entered into this 10th day of June 2016 by WT Cox Information Services hereinafter called the "Contractor" and Commonwealth of Virginia, Virginia Polytechnic Institute and State University called "Virginia Tech."

WITNESSETH that the Contractor and Virginia Tech, in consideration of the mutual covenants, promises and agreements herein contained, agree as follows:

SCOPE OF CONTRACT: The Contractor shall provide Comprehensive Library Serials Services to Virginia Tech as set forth in the Contract Documents.

PERIOD OF CONTRACT: From July 1, 2016 through June 30, 2021.

COMPENSATION AND METHOD OF PAYMENT: The Contractor shall be paid by Virginia Tech in accordance with the Contract Documents.

CONTRACT DOCUMENTS: The Contract Documents shall consist of this signed contract, Request for Proposal (RFP) number 0041984 dated October 28, 2015, Addendum #1 to the RFP dated November 20, 2015, the proposal submitted by the Contractor dated December 4, 2015 and Attachment 1, all of which Contract Documents are incorporated herein.

In WITNESS WHEREOF, the parties have caused this Contract to be duly executed intending to be bound thereby.

Contractor
By: Debra M. Knox
(Signature)
Debra M. Knox, Contract Administration
Name and Title

Virginia Tech
By: Mary W. Helmick
Mary W. Helmick
Director of Procurement



Request for Proposal #0041984

for

Comprehensive Library Serials Services

October 28, 2015

RFP 0041984
GENERAL INFORMATION FORM

1. **QUESTIONS:** All inquiries for information regarding this solicitation should be directed to: Roger Gupta, CPPB, CUPO, VCO, Phone: (540) 231-4177, e-mail: ragupta@vt.edu.
2. **DUE DATE:** Sealed Proposals will be received until December 1, 2015 at 3:00 PM. Failure to submit proposals to the correct location by the designated date and hour will result in disqualification.
3. **ADDRESS:** Proposals should be mailed or hand delivered to: Virginia Polytechnic Institute and State University (Virginia Tech), Procurement Department (MC 0333) North End Center, Suite 2100, Virginia Tech, 300 Turner Street NW, Blacksburg, Virginia 24061. Reference the Opening Date and Hour, and RFP Number in the lower left corner of the return envelope or package.
4. **TYPE OF BUSINESS:** (Please check all applicable classifications). If your classification is certified by the Virginia Department of Small Business and Supplier Diversity (SBSD), provide your certification number: _____. For assistance with SWaM certification, visit the SBSB website at <http://www.dmbc.virginia.gov/>.

Large

Small business – An independently owned and operated business which, together with affiliates, has 250 or fewer employees or average annual gross receipts of \$10 million or less averaged over the previous three years. Department of Minority Business Enterprise (DMBE) certified women-owned and minority-owned business shall also be considered small business when they have received DMBE small business certification.

Women-owned business – A business concern that is at least 51% owned by one or more women who are U. S. citizens or legal resident aliens, or in the case of a corporation, partnership, or limited liability company or other entity, at least 51% of the equity ownership interest is owned by one or more women who are citizens of the United States or non-citizens who are in full compliance with the United States immigration law, and both the management and daily business operations are controlled by one or more women who are U. S. citizens or legal resident aliens.

Minority-owned business – A business concern that is at least 51% owned by one or more minority individuals (see Section 2.2-1401, Code of Virginia) or in the case of a corporation, partnership, or limited liability company or other entity, at least 51% of the equity ownership interest in the corporation, partnership, or limited liability company or other entity is owned by one or more minority individuals and both the management and daily business operations are controlled by one or more minority individuals.

5. **COMPANY INFORMATION/SIGNATURE:** In compliance with this Request For Proposal and to all the conditions imposed therein and hereby incorporated by reference, the undersigned offers and agrees to furnish the services in accordance with the attached signed proposal and as mutually agreed upon by subsequent negotiation.

FULL LEGAL NAME (PRINT) <small>(Company name as it appears with your Federal Taxpayer Number)</small>		FEDERAL TAXPAYER NUMBER (ID#)	
BUSINESS NAME/DBA NAME/TA NAME <small>(If different than the Full Legal Name)</small>		FEDERAL TAXPAYER NUMBER <small>(If different than ID# above)</small>	
BILLING NAME <small>(Company name as it appears on your invoice)</small>		FEDERAL TAXPAYER NUMBER <small>(If different than ID# above)</small>	
PURCHASE ORDER ADDRESS		PAYMENT ADDRESS	
CONTACT NAME/TITLE (PRINT)		SIGNATURE (IN INK)	DATE
E-MAIL ADDRESS	TELEPHONE NUMBER	TOLL FREE TELEPHONE NUMBER	FAX NUMBER TO RECEIVE E-PROCUREMENT ORDERS

2/6/2015

I. PURPOSE:

The purpose of this Request for Proposal (RFP) is to solicit sealed proposals to establish a contract through competitive negotiations for comprehensive print, online, and other format serial or continuations services by Virginia Polytechnic Institute and State University (Virginia Tech), an agency of the Commonwealth of Virginia.

II. CONTRACT PERIOD:

The term of this contract is for five (5) year(s), or as negotiated. There will be an option for five (5) one-year renewals, or as negotiated.

III. BACKGROUND:

The Virginia Association of State College and University Purchasing Professionals (VASCUPP) is an association of eleven (11) public higher education founding and associate member institutions. One initiative of VASCUPP is to identify cooperative procurement opportunities and through competitive negotiations subsequently establishing contracts in accordance with the Code of Virginia and the Commonwealth of Virginia's Purchasing Manual for Institutions of Higher Education and Their Vendors. All VASCUPP members as well as eligible agencies or institutions of the Commonwealth enjoy the benefits derived from increased economies of scale, resulting in lower prices and reduced administrative cost and effort. This solicitation is issued and will be negotiated on behalf of all VASCUPP member institutions. Virginia Polytechnic Institute and State University is serving as the lead institution and signatory on this solicitation and any resulting award(s). The following paragraphs provide background information on the VASCUPP institutions leading this solicitation.

George Mason University (GMU) an Institution of Higher Education of the Commonwealth of Virginia, is a state supported comprehensive University with an FTE (2014) of 27,337. The GMU Libraries has locations on the main campus in Fairfax, and on the Arlington and Science&Technology/Prince William campuses. GMU maintains 3000 journal orders, as well as numerous contracted publisher packages.

James Madison University (JMU) is a comprehensive university in Harrisonburg, Virginia that is part of the statewide system of public higher education in the Commonwealth. The university offers programs on the bachelor's, master's and doctoral levels with its primary emphasis on the undergraduate student. JMU's current enrollment is approximately 20,000 full and part-time students. The University employs approximately 2,900 full-time and part-time faculty and staff. Currently, JMU acquires both electronic and print serials, with electronic serials constituting the majority of subscriptions.

Old Dominion University is a state-supported metropolitan public research institution located in Norfolk, Virginia. It has achieved designation as a research university from the Carnegie Foundation for the Advancement of Teaching. The University offers 42 doctoral, 2 education specialist, 54 master's, and 70 bachelor degrees. More than 70 degree programs are available by satellite, online, video-streaming, and CD-ROM. Total enrollment is 24,670 including 1,092 students from 105 countries. The University employs 1,224 faculty members. University Libraries provide online research databases, eBooks, thousands of online journals, and more than 3 million items in its physical collections.

Radford University is a comprehensive institution that is part of the Commonwealth of Virginia higher education system. Radford's current enrollment is approximately 10,000 full and part-time students. While Radford's primary emphasis is on undergraduate students, the university also offers master's and doctoral level programs. The University employs 1,600 full-time and part-time faculty and staff. Radford has close to 1100 titles managed by our subscriptions vendor.

The University of Virginia (UVa) is a comprehensive university in Charlottesville, Virginia. The 23,000 students attending the University are exposed to the widest spectrum of disciplines – from arts and athletics to humanities and technology. Our students also enjoy a unique connection to the world beyond college through the University's outstanding professional training, exemplified by its nationally ranked schools of Law, Business, and Medicine. UVa currently has over 12,000 permanent University faculty and staff who are committed to serving both the local and national community.

Virginia Commonwealth University (VCU) enrolls over 31,000 students and is classified by Carnegie as Research University (very high research activity). VCU offers 40 doctoral, 74 master's, 3 professional, and 63 baccalaureate degree programs. Libraries at VCU--the James Branch Cabell Library on the Monroe Park Campus and the Tompkins-

McCaw Library for the Health Sciences on the MCV campus--employ 51 professionals and 90 support staff. The Libraries purchases over 5485 serial, subscription, and continuation titles through subscription agents, consortia, and direct with the publisher. Our current subscription agent services 3195 electronic periodical titles, 934 print periodical titles, 425 continuation titles, and 169 print standing order titles.

Virginia Polytechnic Institute and State University, or Virginia Tech (VT), is a public land-grant, seagrant, and space-grant university with the main campus in Blacksburg, Virginia. VT has the largest number of degree offerings in Virginia, enrolling over 31,000 on- and off-campus students taught by 1400 faculty. The bulk of VT's serials and continuations subscriptions are online. Materials allocations are likely to change during the course of the intended contract. Virginia Tech reserves the right to increase or decrease the amount as actual need and funding require.

The College of William and Mary (W&M) is a medium sized doctoral institution and part of the Commonwealth of Virginia higher education system of colleges and universities. Although W&M is primarily an undergraduate institution, our 8,258 students are also involved in doctoral programs (strong programs in History and Physics), a business school, a law school, and the Virginia Institute of Marine Science. There are 2,790 full and part-time faculty and staff to support the curricular mission of the college. Presently, W&M uses three separate accounts for the main library, the law library, and the VIMS library with the same vendor for serials/continuations services for over 7,000 separate orders.

IV. EVA BUSINESS-TO-GOVERNMENT ELECTRONIC PROCUREMENT SYSTEM:

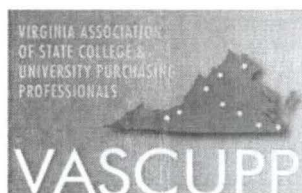
The eVA Internet electronic procurement solution streamlines and automates government purchasing activities within the Commonwealth of Virginia. Virginia Tech, and other state agencies and institutions, have been directed by the Governor to maximize the use of this system in the procurement of goods and services. *We are, therefore, requesting that your firm register as a trading partner within the eVA system.*

There are registration fees and transaction fees involved with the use of eVA. These fees must be considered in the provision of quotes, bids and price proposals offered to Virginia Tech. Failure to register within the eVA system may result in the quote, bid or proposal from your firm being rejected and the award made to another vendor who is registered in the eVA system.

Registration in the eVA system is accomplished on-line. Your firm must provide the necessary information. Please visit the eVA website portal at <http://www.eva.virginia.gov/pages/eva-registration-buyer-vendor.htm> and **register both with eVA and Ariba**. *This process needs to be completed before Virginia Tech can issue your firm a Purchase Order or contract.* If your firm conducts business from multiple geographic locations, please register these locations in your initial registration.

For registration and technical assistance, reference the eVA website at: eVATheUniversityCare@dgs.virginia.gov, or call 866-289-7367 or 804-371-2525.

V. CONTRACT PARTICIPATION:



College of William and Mary
George Mason University
James Madison University
Old Dominion University
Radford University
The University of Virginia
Virginia Commonwealth University
Virginia Military Institute
Virginia Tech

It is the intent of this solicitation and resulting contract to allow for cooperative procurement. Accordingly, any public body, public or private health or educational institutions, or Virginia Tech's affiliated corporations and/or partnerships may access any resulting contract if authorized by the contractor.

Participation in this cooperative procurement is strictly voluntary. If authorized by the Contractor, the resultant contract may be extended to the entities indicated above to purchase at contract prices in accordance with contract terms. The Contractor shall notify Virginia Tech in writing of any such entities accessing the contract. No modification of this contract or execution of a separate contract is required to participate. The Contractor will provide semi-annual usage reports for all entities accessing the Contract. Participating entities shall place their own orders directly with the Contractor and shall fully and independently administer their use of the contract to include

contractual disputes, invoicing and payments without direct administration from Virginia Tech. Virginia Tech shall not be held liable for any costs or damages incurred by any other participating entity as a result of any authorization by the Contractor to extend the contract. It is understood and agreed that Virginia Tech is not responsible for the acts or omissions of any entity, and will not be considered in default of the contract no matter the circumstances.

Use of this contract does not preclude any participating entity from using other contracts or competitive processes as the need may be.

VI. STATEMENT OF NEEDS:

A. General

The Contractor shall provide comprehensive services for print and electronic periodicals, continuations, publishers' series, online databases and other electronic resources, and continuing titles (hereafter referred to as serials) for higher education institutions and other agencies of the Commonwealth of Virginia. Services include the provision of all serials, orders, renewals, cancellations, handling of claims, and invoicing.

B. Customer Service

1. The Contractor shall assign a specific in-house account representative to handle the university's orders, cancellations, claims, requests for reports, invoicing questions, etc. The in-house representative shall respond to all inquiries within one (1) business day, e-mail preferred.
2. A Contractor's representative shall visit the university, upon request and at intervals agreeable to both parties, to discuss service to the university's account and other serials management issues.
3. The Contractor shall provide toll-free telephone numbers, fax numbers, and e-mail addresses for all staff assigned to the university's account.
4. The Contractor shall maintain accurate and current records of the university's active serials orders in the Contractor's online catalog and subscription management database.
5. The Contractor shall handle correspondence with publishers in regard to duplication, cancellations, claims, address changes, adjustments, and other service communications such as title migrations and publisher changes.

C. Orders

1. For new orders in an online format, Contractor will acknowledge new orders within two (2) business days and access permissions to the title should be delivered to the university within ten (10) business days of order submission to publisher.
2. For new orders in print format, the first issue of a new order should be delivered to the university within eight (8) weeks for North American publishers and ten (10) weeks for other publishers, or when the university has designated that the next volume should begin.
3. New orders and payments to publishers shall be released to publishers within ten (10) days of receipt of a new order.
4. Renewal orders and payments to publishers shall be released to publishers sixty (60) days prior to the expiration date of renewed subscriptions.
5. The Contractor shall accept new orders from the university at any time during the year. These orders shall be merged into the next main renewal invoice.
6. The university will specify the beginning issue and/or start date of a new subscription order. Unless otherwise indicated, the latest edition published is to be supplied.
7. The Contractor shall accept subscription orders on the annual renewal list invoice as automatic renewals to run until not renewed expressly by the university or otherwise cancelled.

8. The Contractor shall provide special and priority handling of rush orders.
9. If part of the paid subscription, all indexes, supplementary numbers, and added volumes shall be serviced automatically as part of the subscription. The Contractor should notify the university, of supplementary items not included as part of the subscription, and indicate handling procedures for the same.
10. If unable to supply a title, the Contractor shall notify the university within thirty (30) days for North American publishers and forty-five (45) days for other publishers.
11. Order substitutions or additions of titles shall not be permitted unless expressly authorized by the university on a title-by-title basis.
12. The Contractor shall alert the university, of the presence of any license agreements before placing the order with the publisher.
13. The Contractor shall provide a common expiration date of December 31 unless otherwise indicated by the library or publisher.
14. On the Order Invoice the Contractor shall include assigned fund codes and the university's order record number.
15. The Contractor shall alert the university to the possibility of online availability, any changes in the current online availability, and changes made to pricing models.
16. The Contractor shall maintain for up to five (5) years full and complete records of all financial transactions processed for the university and, upon request, supply records to the university.

D. Subscription Renewals

1. The Contractor shall notify the university of excessive price increases from the base price on the last renewal invoice before the order is placed with the publisher at benchmarks set by the university (e.g., over \$500 or 100% price increases).
2. The Contractor shall supply a list of all subscribed titles for renewal, including fund code, order number, renewal date, the university's order record number, title format, and estimated price. Contractor shall provide the renewal list in the format(s) designated by the university, (e.g., printed, PDF, or spreadsheet).
3. The university reserves the right to not renew orders. The university may indicate non-renewal by lining off on the annual renewal invoice, selecting no in Contractor's online renewal module, or contacting Contractor's representative in order to prevent renewal for the subsequent periods.
4. On the renewal list, the Contractor shall alert the university to any changes in a title's format that may impact availability.

E. Claims

1. The Contractor shall provide a flexible, fast, and effective online claims service with reporting and reclaiming assistance features, including bibliographic and financial information. The university may claim missing issues through the Contractor or directly from the publisher.
2. The university will submit claims to the Contractor's representative and/or Contractor's online claiming module.
3. The Contractor shall submit claims to the publisher within five (5) business days of receipt from the university.
4. The Contractor shall notify the university, of the status of all outstanding claims via a monthly report. The Contractor's representative shall also respond to individual requests for claims status.

5. On claims for missing issues submitted by the university within the publisher's specified time period, the Contractor shall secure replacements free of charge or provide a credit to cover the cost for purchasing the missing issues.

F. Cancellations

1. The Contractor shall cancel individual titles at any time during the subscription year when notified by the university.
2. The effective date of cancellation will be determined by the university, except in the case of publishers' restrictions.
3. The Contractor shall acknowledge receipt of the university's cancellation notice via e-mail, letter, or regular report. Cancelled titles shall be deleted from further renewal lists and invoices.
4. The Contractor shall request refunds of any unexpired portions of orders. Refund credits for the full amounts refunded by the publishers shall be refunded to the university.
5. The university reserves the right to cancel any renewal that has increased from the base price on the last renewal invoice over the benchmark established by the university (e.g., over \$500 or 100% price increase) even if not advised of price increase before the renewal is placed with the publisher.

G. Contractor's Serials Management System

1. The Contractor must provide an online serials management system (System) for maintaining serials subscription functions such as ordering, claiming, invoicing, financial, and title and subscription verification.
2. The Contractor shall maintain accurate and current records of the university's active serials orders in the System.
3. Contractor shall maintain at least three years of the university's subscription data.
4. System records should provide comprehensive data on each title including, but not limited to:
 - a) Title, publisher, and ISSN
 - b) Available formats
 - c) Available packages and memberships with relationships to title clearly delineated
 - d) The university's Integrated Library System (ILS) data (fund codes, order number)
 - e) Account numbers
 - f) Active subscription data (most recent invoice, subscription cycle, term, order status)
 - g) Online Title registration information for third party platforms
 - h) Publisher's registration identification number
 - i) Licensing information
 - j) Links to URL for online access
5. The Contractor shall provide the university with the administrative and technical support to perform online subscription management operations including, but not limited to, direct transmission of online orders, electronic claiming, and report generation.
6. The Contractor shall provide the university with the ability to search the System to determine availability, price, and other variables prior to placement of an order. The Contractor should provide training on how to use the System at no additional charge to the university.

H. Reports

1. The Contractor shall make the monthly report data available online and, upon request, in print. These monthly reports to include, but not be limited to, the following:
 - a) Price increase alerts
 - b) Pricing model change alerts

- c) Format changes / format options
 - d) Ceased publications
 - e) Suspended publications
 - f) Publication delays
 - g) Publishing frequency changes
 - h) Publisher changes
 - i) Title changes
 - j) Title mergers and splits
 - k) New volumes
 - l) Titles and issues claimed
 - m) Titles that the Contractor can no longer supply
 - n) Membership or combination subscription changes
 - o) Titles recently cancelled by the university
 - p) Electronic availability (for new orders only)
2. The Contractor should supply fiscal and collection management reports free of charge as requested. The Contractor should make this fiscal and collection management report data available online. These reports to include, but not be limited to, the following:
- a) Average total of all Contractor charges (service, handling, etc.)
 - b) Individual Contractor charges (service, handling, etc.)
 - c) Subscriptions listed by Library of Congress classification or title
 - d) Total expenditures by subject classification
 - e) Number of claims submitted
 - f) Number of claims resolved
 - g) List of membership and combination titles
 - h) Complete records of all financial transactions processed for the university
 - i) Current titles on order, title prices and current price adjustments, frequencies, quantities, invoice identification, and unique library-specified codes.
3. The Contractor shall regularly notify the university, of the availability of supplementary materials related to subscriptions, i.e. supplements and special issues not included in the main subscription.
4. The Contractor should provide custom fiscal and collection management reports in a timely manner as requested by the university. Reports should be provided in spreadsheet format.

I. Pricing

The university reserves the right to obtain supporting documentation on prices from the Contractor at any time during the contract period.

J. Invoicing

1. The following information shall appear on each invoice:
- a) Name and address of the Contractor
 - b) The university bill-to address
 - c) The university ship-to address
 - d) The university account number assigned by the Contractor
 - e) The university's purchase order number
 - f) The university's ILS order record number for each title
 - g) Title (include a breakdown of titles which are parts of memberships, combinations, or series)
 - h) Publisher
 - i) Frequency
 - j) Number of copies being ordered for each subscription
 - k) ISSN
 - l) Period covered (inclusive dates)
 - m) Volume number (beginning with new title)
 - n) Price
 - o) Service charge, if any

- p) Shipping and handling fees
- q) Summary page detailing total prices, total additional charges (if any), and net total
- r) The university's ILS fund code
- s) Format

2. Supplemental Invoices:

The Contractor shall supply monthly supplementary invoices for titles on which the publisher price exceeded the originally billed publisher's price with reasons for additional charges. The supplementary invoice shall also include any credits to the university's account that result from overcharges, cancellations or cessations of a subscription.

3. Separate Invoices:

The Contractor should supply separate invoices as requested by the university.

4. The Contractor shall supply invoices in printable electronic format to the attention of the university's invoice processing designee(s).

5. The Contractor should have the capability to transmit Electronic Data Interchange (EDI) transactions with a variety of ILS environments.

6. The Contractor shall supply, upon request, proof of payments made to publishers.

7. Multi-title packages (bundled orders and 'Big Deal' packages) should be invoiced at the title level detail and title-by-title pricing whenever possible.

8. The Contractor shall issue a check to the university, for all outstanding credits at the end of the contract period.

K. Shipments

1. Delivery of all materials shall be made FOB destination inside the university's premises as specified by the university.

2. The university shall not be held responsible for shipments lost in transit or otherwise not received. The Contractor shall provide replacement copies at no charge for defective, mutilated, or damaged issues, or those that are not delivered within publisher policies.

L. Other

1. Upon request, the Contractor should provide the university with trial access to future serials management services and modules and other related peripheral services as they are developed.

VII. PROPOSAL PREPARATION AND SUBMISSION:

A. General Requirements

1. RFP Response: In order to be considered for selection, Offerors must submit a complete response to this RFP. **One original hard copy, Eight (8) copies and two complete electronic copies on flash drive or disc** of each proposal must be submitted to:

Procurement Department (MC 0333)
North End Center, Suite 2100, Virginia Tech
300 Turner Street NW
Blacksburg, Virginia 24061

Reference the Opening Date and Hour, and RFP Number in the lower left hand corner of the return envelope or package.

No other distribution of the proposals shall be made by the Offeror.

2. Proposal Preparation:

- a. Proposals shall be signed by an authorized representative of the Offeror. All information requested should be submitted. Failure to submit all information requested may result in Virginia Tech requiring prompt submission of missing information and/or giving a lowered evaluation of the proposal. Proposals which are substantially incomplete or lack key information may be rejected by Virginia Tech at its discretion. Mandatory requirements are those required by law or regulation or are such that they cannot be waived and are not subject to negotiation.
 - b. Proposals should be prepared simply and economically providing a straightforward, concise description of capabilities to satisfy the requirements of the RFP. Emphasis should be on completeness and clarity of content.
 - c. Proposals should be organized in the order in which the requirements are presented in the RFP. All pages of the proposal should be numbered. Each paragraph in the proposal should reference the paragraph number of the corresponding section of the RFP. It is also helpful to cite the paragraph number, subletter, and repeat the text of the requirement as it appears in the RFP. If a response covers more than one page, the paragraph number and subletter should be repeated at the top of the next page. The proposal should contain a table of contents which cross references the RFP requirements. Information which the offeror desires to present that does not fall within any of the requirements of the RFP should be inserted at an appropriate place or be attached at the end of the proposal and designated as additional material. Proposals that are not organized in this manner risk elimination from consideration if the evaluators are unable to find where the RFP requirements are specifically addressed.
 - d. Each copy of the proposal should be bound in a single volume where practical. All documentation submitted with the proposal should be bound in that single volume.
 - e. Ownership of all data, material and documentation originated and prepared for Virginia Tech pursuant to the RFP shall belong exclusively to Virginia Tech and be subject to public inspection in accordance with the Virginia Freedom of Information Act. Trade secrets or proprietary information submitted by an Offeror shall not be subject to public disclosure under the Virginia Freedom of Information Act. However, to prevent disclosure the Offeror must invoke the protections of Section 2.2-4342F of the Code of Virginia, in writing, either before or at the time the data or other materials is submitted. The written request must specifically identify the data or other materials to be protected and state the reasons why protection is necessary. The proprietary or trade secret material submitted must be identified by some distinct method such as highlighting or underlining and must indicate only the specific words, figures, or paragraphs that constitute trade secret or proprietary information. The classification of an entire proposal document, line item prices and/or total proposal prices as proprietary or trade secrets is not acceptable and may result in rejection of the proposal.
3. Oral Presentation: Offerors who submit a proposal in response to this RFP may be required to give an oral presentation of their proposal to Virginia Tech. This will provide an opportunity for the Offeror to clarify or elaborate on the proposal but will in no way change the original proposal. Virginia Tech will schedule the time and location of these presentations. Oral presentations are an option of Virginia Tech and may not be conducted. Therefore, proposals should be complete.

B. Specific Requirements

Proposals should be as thorough and detailed as possible so that the VASCUPP Serials RFP Committee may properly evaluate your capabilities to provide the required services. Offerors are required to submit the following information/items as a complete proposal:

1. Ability to Provide Services:
 - a. Explain how the offeror is a prime serials vendor dealing directly with serial publishers.
 - b. Provide the approximate number of serial publishers for which service is supplied.
 - c. Provide the approximate number of serial titles currently supplied.

- d. Describe the offeror's ability to provide and service serials subscriptions from domestic and non-U.S. publishers, and from commercial and noncommercial publishers. Be sure to mention exceptions and exclusions.
- e. Provide evidence of financial stability for at least the last three (3) years of the offeror's operation to include credit rating.
- f. Provide a description (bullet points) of the key individuals who would be assigned to any resulting contract, including contact information and experience.
- g. Provide a narrative statement (bullet points) describing specific plans for providing the proposed service, including how and when the services will be performed.
- h. Provide a narrative statement (bullet points) or statistical reports describing internal quality control procedures.
- i. Describe in detail your step-by-step plan for converting subscriptions currently serviced by other vendors.

2. Electronic Resources

- a. Describe any electronic resource management modules offered to assist with the acquisition and management of electronic journals, electronic journal packages, and online databases.
- b. Describe the process by which access is activated for online journals hosted on third party platforms (e.g. Ingenta, Atypon, Highwire, etc.)
- c. Describe the notification process if additional registration or license execution were required in order to activate title access.
- d. Describe any statistics you can provide for electronic resource access, printing, or downloading.
- e. Describe your system or resource for the collection and consolidation of journal and database usage statistics:
 - i. Describe how the system presents the data in a standardized and user-friendly format with a single point of access.
 - ii. Describe and provide any conditions necessary for the library to access this system.
 - iii. Describe how the system compiles and links statistics with payment data.
 - iv. Describe how the system integrates vendors and payments that are not processed through the vendor.
- f. Describe the process that is used to claim online journals and online journal access issues.
- g. Provide a timeline describing the intervals between the time of receiving an online access problem report to when it is reported to the provider to when it is resolved.
- h. Describe the initial and follow-up processes used to resolve the problem.
- i. Describe any 24-hour reporting and response ticketing system.
- j. Describe how Open Access titles are identified and how the university will be notified of their existence.
- k. Describe how online-only subscriptions that have delayed publications are handled.
- l. Describe how billing would be handled throughout that delay.

3. Pricing and Payments:

- a. Describe any special rates or pricing you would offer in a multi-year, multi-institution consortial contract.
- b. Describe any title fee discount or waiver you would offer in a multi-year, multi-institution consortial contract.
- c. Describe any other price-related inducements you would offer in a multi-year, multi-institution consortial contract.
- d. Describe any terms and/or discounts applicable for one-line invoice payments, prepayments, deposit accounts, and other payment options in a multi-year, multi-institution consortial contract.
- e. Provide pricing for all continuations as listed in Attachment C.
- f. Provide a brief narrative outlining how the university's prepayment and/or current subscription payments are insured or otherwise protected.
- g. Provide a schedule of the payment, invoicing, and renewal cycle.
- h. Describe your EDI interface and furnish a list of ILSs successfully using your EDI records.
- i. Provide sample invoices and other relevant fiscal documents.

4. Reports:

- a. Provide samples of all standard reports available as outlined in Section VI, H.
- b. Indicate any applicable policies, such as price or advance time, required for preparation of customized or nonstandard reports.

5. Provide four (4) recent references, either educational or governmental, for whom you have provided the type of services described herein. Include the date(s) the services were furnished, the client name, address and the name and phone number of the individual the VASCUPP Serials RFP Committee has your permission to contact.

6. Participation of Small, Women-owned and Minority-owned Business (SWaM) Business:

If your business can not be classified as SWaM, describe your plan for utilizing SWaM subcontractors if awarded a contract. Describe your ability to provide reporting on SWaM subcontracting spend when requested. If your firm or any business that you plan to subcontract with can be classified as SWaM, but has not been certified by the Virginia Department of Small Business and Supplier Diversity (SBSD), it is expected that the certification process will be initiated no later than the time of the award. If your firm is currently certified, you agree to maintain your certification for the life of the contract. For assistance with SWaM certification, visit the SBSDD website at <http://www.dmbv.virginia.gov/>.

7. The return of the General Information Form and addenda, if any, signed and filled out as required.

VIII. SELECTION CRITERIA AND AWARD:

A. Selection Criteria

Proposals will be evaluated by Virginia Tech using the following:

<u>Criteria</u>	<u>Maximum Point Value</u>
1. Ability to provide services	35

2. Electronic Resources	20
3. Pricing and payments	20
4. References	15
5. Participation of Small, Women-Owned and Minority (SWAM) Business	10

Total	100
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B. Award

Selection shall be made of two or more offerors deemed to be fully qualified and best suited among those submitting proposals on the basis of the evaluation factors included in the Request for Proposal, including price, if so stated in the Request for Proposal. Negotiations shall then be conducted with the offerors so selected. Price shall be considered, but need not be the sole determining factor. After negotiations have been conducted with each offeror so selected, Virginia Tech shall select the offeror which, in its opinion, has made the best proposal, and shall award the contract to that offeror. Virginia Tech may cancel this Request for Proposal or reject proposals at any time prior to an award. Should Virginia Tech determine in writing and in its sole discretion that only one offeror has made the best proposal, a contract may be negotiated and awarded to that offeror. The award document will be a contract incorporating by reference all the requirements, terms and conditions of this solicitation and the Contractor's proposal as negotiated. See Attachment B for sample contract form.

X. INVOICES:

Invoices for items ordered, delivered and accepted shall be submitted by the contractor directly to the payment address shown on the purchase order/contract. All invoices shall show the state contract number and/or purchase order number; social security number (for individual contractors) or the federal employer identification number (for proprietorships, partnerships, and corporations).

Invoices for goods or services provided to Virginia Tech under any contract resulting from this solicitation shall be submitted to:

Virginia Tech Serials Receiving
University Libraries 0434
560 Drillfield Drive
Blacksburg, Virginia 24061-0001

Invoices for goods or services provided to VASCUPP institutions or any Commonwealth of Virginia institution or agency under any contract resulting from this solicitation shall be submitted to their corresponding payment address.

XI. METHOD OF PAYMENT:

The contractor will be paid on the basis of invoices submitted in accordance with the solicitation and any negotiations.

VASCUPP recognizes the importance of expediting the payment process for our vendors and suppliers. VASCUPP member institutions have implemented electronic payment systems with either Wells Fargo Bank or Bank of America. To participate in any cash discount for early payment program offered by a VASCUPP member institution, contractors may be required to enroll in these Wells Fargo Bank or Bank of America programs.

VASCUPP member institution Wells Fargo Bank example:

Payment can be expedited through the use of the Wells One AP Control Payment System. Virginia Tech strongly encourages participation in this program. For more information on this program please refer to Virginia Tech's Procurement website: <http://www.procurement.vt.edu/Vendor/WellsOne.html> or contact the person in Procurement Department identified in the RFP.

VASCUPP member institution Bank of America example:

To enroll in the Bank of America's ("BoA") ePayables® method of electronic payment or BoA's PayMode® method of electronic payment contact the University of Virginia Procurement and Supplier Diversity Services' Payment Processor Specialist group to set up its preferred method of receiving electronic payments [Phone: (434) 924-4212 and E-mail: uva-prs-boa@virginia.edu].

XII. ADDENDUM:

Any ADDENDUM issued for this solicitation may be accessed at <http://www.procurement.vt.edu/html.docs/bids.php>. Since a paper copy of the addendum will not be mailed to you, we encourage you to check the web site regularly.

XIII. CONTRACT ADMINISTRATION:

- A. Ladd Brown, Head of Acquisitions, University Libraries at Virginia Tech or his designee, shall be identified as the Contract Administrator and shall use all powers under the contract to enforce its faithful performance.
- B. The Contract Administrator, or his designee, shall determine the amount, quantity, acceptability, fitness of all aspects of the services and shall decide all other questions in connection with the services. The Contract Administrator, or his/her designee, shall not have authority to approve changes in the services which alter the concept or which call for an extension of time for this contract. Any modifications made must be authorized by the Virginia Tech Procurement Department through a written amendment to the contract.

XIV. COMMUNICATIONS:

Communications regarding this Request for Proposals (RFP) shall be formal from the date of issue for this RFP, until either a Contractor has been selected or the Procurement Department rejects all proposals. Formal communications will be directed to the Procurement Department. Informal communications, including but not limited to request for information, comments or speculations regarding this RFP to any University employee other than a Procurement Department representative may result in the offending Offeror's proposal being rejected.

XV. CONTROLLING VERSION OF SOLICITATION:

The PDF version of the solicitation and any addenda issued by Virginia Tech Procurement Services is the mandatory controlling version of the document. Any modification of/or additions to the solicitation by the Offeror shall not modify the official version of the solicitation issued by Virginia Tech Procurement Services. Such modifications or additions to the solicitation by the Offeror may be cause for rejection of the proposal; however, Virginia Tech reserves the right to decide, on a case by case basis, in its sole discretion, whether to reject such a proposal.

XVI. TERMS AND CONDITIONS:

This solicitation and any resulting contract/purchase order shall be governed by the attached terms and conditions.

XVII. ATTACHMENTS:

- Attachment A - Terms and Conditions
- Attachment B - Standard Contract Form
- Attachment C - Subscription Pricing

VIRGINIA POLYTECHNIC INSTITUTE AND STATE UNIVERSITY
Procurement Department (MC 0333)
North End Center, Suite 2100, Virginia Tech
300 Turner Street NW
Blacksburg, Virginia 24061

The offeror takes the risk that if the envelope is not marked as described above, it may be inadvertently opened and the information compromised, which may cause the proposal to be disqualified. Bids or Proposals may be hand delivered to the designated location in the office issuing the solicitation. No other correspondence or other bids/proposals should be placed in the envelope.

8. **INSURANCE:** By signing and submitting a proposal under this solicitation, the Offeror certifies that if awarded the contract, it will have the following insurance coverages at the time the work commences. Additionally, it will maintain these during the entire term of the contract and that all insurance coverages will be provided by insurance companies authorized to sell insurance in Virginia by the Virginia State Corporation Commission.

During the period of the contract, Virginia Tech reserves the right to require the Contractor to furnish certificates of insurance for the coverage required.

INSURANCE COVERAGES AND LIMITS REQUIRED:

- A. Worker's Compensation - Statutory requirements and benefits.
- B. Employers Liability - \$100,000.00
- C. General Liability - \$500,000.00 combined single limit. Virginia Tech and the Commonwealth of Virginia shall be named as an additional insured with respect to goods/services being procured. This coverage is to include Premises/Operations Liability, Products and Completed Operations Coverage, Independent Contractor's Liability, Owner's and Contractor's Protective Liability and Personal Injury Liability.
- D. Automobile Liability - \$500,000.00
- E. Builders Risk – For all renovation and new construction projects under \$100,000 Virginia Tech will provide All Risk – Builders Risk Insurance. For all renovation contracts, and new construction from \$100,000 up to \$500,000 the contractor will be required to provide All Risk – Builders Risk Insurance in the amount of the contract and name Virginia Tech as additional insured. All insurance verifications of insurance will be through a valid insurance certificate. The contractor agrees to be responsible for, indemnify, defend and hold harmless Virginia Tech, its officers, agents and employees from the payment of all sums of money by reason of any claim against them arising out of any and all occurrences resulting in bodily or mental injury or property damage that may happen to occur in connection with and during the performance of the contract, including but not limited to claims under the Worker's Compensation Act. The contractor agrees that it will, at all times, after the completion of the work, be responsible for, indemnify, defend and hold harmless Virginia Tech, its officers, agents and employees from all liabilities resulting from bodily or mental injury or property damage directly or indirectly arising out of the performance or nonperformance of the contract.

9. **NOTICES:** Any notices to be given by either party to the other pursuant to any contract resulting from this solicitation shall be in writing, hand delivered or mailed to the address of the respective party at the following address

If to Contractor: Address Shown On RFP Cover Page
Attention: Name Of Person Signing RFP

If to Virginia Tech:
Virginia Polytechnic Institute and State University
Attn: Roger Gupta
Procurement Department (MC 0333)
North End Center, Suite 2100, Virginia Tech
300 Turner Street NW
Blacksburg, Virginia 24061
and
Virginia Polytechnic Institute and State University
Attn: Ladd Brown
University Libraries
Virginia Tech
560 Drillfield Drive
Blacksburg, VA 24061-0001

10. **SEVERAL LIABILITY:** Virginia Tech will be severally liable to the extent of its purchases made against any contract resulting from this solicitation. Applicable entities described herein will be severally liable to the extent of their purchases made against any contract resulting from this solicitation.

ATTACHMENT B

**Standard Contract form for reference only
Offerors do not need to fill in this form**

**COMMONWEALTH OF VIRGINIA
STANDARD CONTRACT**

Contract Number: _____

This contract entered into this ____ day of _____, 20__, by _____, hereinafter called the "Contractor" and Commonwealth of Virginia, Virginia Polytechnic Institute and State University called "Virginia Tech".

WITNESSETH that the Contractor and Virginia Tech, in consideration of the mutual covenants, promises and agreements herein contained, agrees as follows:

SCOPE OF CONTRACT: The Contractor shall provide the _____ to Virginia Tech as set forth in the Contract Documents.

PERIOD OF CONTRACT: From _____ through _____.

COMPENSATION AND METHOD OF PAYMENT: The Contractor shall be paid by Virginia Tech in accordance with the contract documents.

CONTRACT DOCUMENT: The Contract Documents shall consist of this signed contract, Request For Proposal Number _____ dated _____, together with all written modifications thereof and the proposal submitted by the Contractor dated _____ and the Contractor's letter dated _____, all of which Contract Documents are incorporated herein.

In WITNESS WHEREOF, the parties have caused this Contract to be duly executed intending to be bound thereby.

Contractor:

Virginia Tech

By: _____

By: _____

Title: _____

Title: _____

Attachment C – Subscription Pricing

NOTE: Please provide pricing for the following serial titles. The pricing should be in USD for a 2016, year-long subscription. In the case of per volume pricing, use the latest volume / item pricing on record. If FTE is used to determine tiered pricing, use a 25,000 FTE single-site doctoral university as a model.			
TITLE	FORMAT	PRICE	NOTES
AAPG BULLETIN - ONLINE	O (ONLINE)		
AJR AMERICAN JOURNAL OF ROENTGENOLOGY	O		
AKC GAZETTE (MICROFILM)	M (MICROFORM)		
AMERICAN ANCESTORS - [DATABASE]	P+O (PRINT+ONLINE)		
AMERICAN BOOKTRADE DIRECTORY.	P (PRINT)		
AMERICAN JOURNAL OF AGRICULTURAL ECONOMICS - ONLINE	O		
AMERICAN JOURNAL OF CRITICAL CARE	O		
AMERICAN JOURNAL OF CRITICAL CARE	O		
AMERICAN JOURNAL OF DRUG AND ALCOHOL ABUSE	O		
AMERICAN JOURNAL OF PHYSIOLOGY	O		
AMERICAN JOURNAL OF PSYCHIATRY - ONLINE	O		
AMERICAN LIBRARIES	P		
AMERICAN LIBRARY ASSOCIATION MEMBERSHIP	M (MEMBERSHIP)		
AMERICAN LIBRARY DIRECTORY; A CLASSIFIED LIST OF LIBRARIES IN THE UNITED STATES	P		
AMERICAN MATHEMATICAL SOCIETY INSTITUTIONAL MEMBERSHIP	M		
AMERICAN MATHEMATICAL SOCIETY TRANSLATIONS	P		
AMERICAN MEN & WOMEN OF SCIENCE - ONLINE	O		
AMERICAN SURGEON	O		
ANNALS OF MATHEMATICS STUDIES	P		
APPALACHIAN JOURNAL	P		
APPLIED ECONOMIC PERSPECTIVES AND POLICY - ONLINE	O		
ARCHITECTURAL RECORD	P		
ARIEL	P		
ARQUEOLOGIA MEXICANA	P		
ARS ORIENTALIS	P		
ART BULLETIN - PRINT + ONLINE	P+O		
ART JOURNAL - PRINT + ONLINE	P+O		
ARTES DE MEXICO	P		
ATLA BIBLIOGRAPHY SERIES	P		
AUGUSTA ANNALS	P		
AUGUSTA HISTORICAL BULLETIN	P		
BACH	P		
BANK DIRECTORY	P		
BERG FASHION LIBRARY	DB (DATABASE)		
BEST AMERICAN SHORT PLAYS	P		
BEST PLAYS THEATER YEARBOOK	P		
BLUE RIDGE COUNTRY	P		
BLUEGRASS UNLIMITED	P		
BMC ANESTHESIOLOGY	O		
BNA TAX MANAGEMENT LIBRARY	DB		
BOOK LINKS	P		
BOOKLIST	P		
BRITISH JOURNAL OF PHOTOGRAPHY	P		
BRITISH JOURNAL OF RADIOLOGY	O		
BULLETIN OF THE AMERICAN MATHEMATICAL SOCIETY - ONLINE	O		
CAMPING MAGAZINE	P		

CANADIAN AMERICAN SLAVIC STUDIES - PRINT + ONLINE	P+O		
CHEMICAL & ENGINEERING NEWS - ONLINE	O		
CHEMICAL AND ENGINEERING NEWS	O		
CHILDREN'S CORE COLLECTION	P		
CHILDREN'S LITERATURE REVIEW - ONLINE	O		
CHRONICLE OF HIGHER EDUCATION - ONLINE	O		
CHRONICLE OF HIGHER EDUCATION (MICROFILM)	MF		
CHRONICLE OF PHILANTHROPY - ONLINE	O		
CLASSICAL AND MEDIEVAL LITERATURE CRITICISM - ONLINE	P		
CODE OF VIRGINIA, 1950. WITH PROVISIONS FOR SUBSEQUENT POCKET PARTS	P		
COLLEGE ART ASSOCIATION OF AMERICA. INSTITUTIONAL MEMBERSHIP [CAA JOURNALS]	M		
COMMERCIAL ATLAS AND MARKETING GUIDE	P		
COMMODITY MARKET REVIEW.	P		
CONSENSUS FORECASTS	P		
CONTEMPORARY AUTHORS.	P		
CONTEMPORARY AUTHORS. NEW REV. SER	P		
CONTEMPORARY LITERARY CRITICISM - ONLINE	O		
CONTEMPORARY SOCIOLOGY	O		
COST ACCOUNTING STANDARDS GUIDE	P		
COUNSELING AND HUMAN DEVELOPMENT	P		
COUNTRIES OF THE WORLD AND THEIR LEADERS YEARBOOK	P		
CPA MAGAZINE	P		
DAILY PRESS	N (NEWSPAPER)		
DAILY PRESS (DIGITAL MICROFILM)	MF		
DANCE THEATRE JOURNAL	P		
DENTAL ASSISTANT	O		
DESKBOOK ENCYCLOPEDIA OF AMERICAN SCHOOL LAW	P		
DEUTSCHES LITERATUR-LEXIKON. BIOGRAPH.-BIBLIOGRAPH. HANDBUCH	P		
DIABETES CARE	O		
DICTIONARY OF AFRICAN BIOGRAPHY - ONLINE	O		
DICTIONARY OF LITERARY BIOGRAPHY - ONLINE	O		
DISCOVER	P		
DRAMA CRITICISM - ONLINE	O		
DYSPHAGIA	O		
EDUCATIONAL PHILOSOPHY AND THEORY - ONLINE	O		
ERGEBNISSE DER MATHEMATIK UND IHRER GRENZGEBIETE	P		
EUROPA WORLD YEAR BOOK - ONLINE	O		
FAMILIES IN SOCIETY	O		
FAMILIES IN SOCIETY	O		
FASB ACCOUNTING STANDARDS UPDATE	P		
FICTION CORE COLLECTION	P		
FOCUS ON EXCEPTIONAL CHILDREN	P		
FOLIA PHONiatrica ET LOGOPAEDICA	P		
FOOD TECHNOLOGY	O		
GALE DIRECTORY OF PUBLICATIONS AND BROADCAST MEDIA - ONLINE	O		
GALE VIRTUAL REFERENCE LIBRARY	DB		
GARDEN CLUB OF AMERICA BULLETIN	P		
GOVERNMENT FINANCE REVIEW	P		
GRUNDLEHREN DER MATHEMATISCHEN WISSENSCHAFTEN	P		
GUARDIAN WEEKLY (MICROFILM)	MF		
GUIDE TO U.S. GOVERNMENT PUBLICATIONS	P		
GUITAR PLAYER	P		

HANGING LOOSE	P		
HARVEY LECTURES	P		
HOOVERS	DB		
HOSPITAL PRACTICE	O		
HR MAGAZINE	P		
HUNTINGTON LIBRARY PRESS PUBLICATIONS	P		
INDIA, A REFERENCE ANNUAL	P		
INDEX TO PROCEEDINGS OF THE GENERAL ASSEMBLY	P		
INDEX TO PROCEEDINGS OF THE SECURITY COUNCIL	P		
INTERNATIONAL DEBT STATISTICS	P		
IRISH UNIVERSITY REVIEW	P		
ITALIAN STUDIES - ONLINE	O		
JAC : A JOURNAL OF COMPOSITION THEORY	P		
JOURNAL (GARDEN CLUB OF VIRGINIA)	P		
JOURNAL OF APPALACHIAN STUDIES	P		
JOURNAL OF DECORATIVE AND PROPAGANDA ARTS	P		
JOURNAL OF EMERGING MARKETS	P		
JOURNAL OF GERONTOLOGICAL NURSING	O		
JOURNAL OF IMMUNOLOGY	O		
JOURNAL OF INFORMATION ETHICS	P		
JOURNAL OF INTERACTIVE LEARNING RESEARCH	O		
JOURNAL OF HERPETOLOGICAL MEDICINE AND SURGERY	P+O		
JOURNAL OF NURSING EDUCATION	O		
JOURNAL OF NURSING EDUCATION	O		
JOURNAL OF PHILOSOPHY	P		
JOURNAL OF RESEARCH IN BUSINESS EDUCATION	P		
JOURNAL OF THE ACADEMY OF MARKETING SCIENCE	O		
JOURNAL OF THE AMERICAN DENTAL ASSOCIATION	O		
JOURNAL OF THE INTERDENOMINATIONAL THEOLOGICAL CENTER	P		
JOURNALISM & MASS COMMUNICATION EDUCATOR	O		
JOURNALISM QUARTERLY	O		
JOURNALS OF THE HOUSE OF COMMONS [MICROFORM]	P		
JOVE: JOURNAL OF VISUALIZED EXPERIMENTS - ONLINE	O		
KEYBOARD	P		
KRITISCHE BERICHTE / WOLFGANG AMADEUS MOZART	P		
L'ANNÉE PHILOLOGIQUE [DATABASE]	O		
LEARNING DISABILITIES	P		
LEARNING DISABILITY QUARTERLY	O		
LECTURE SERIES / VON KARMAN INSTITUTE FOR FLUID DYNAMICS	P		
LIBRARY AND BOOK TRADE ALMANAC	P		
LIBRARY ISSUES	P		
LIBRARY OF AMERICA	P		
LIST & INDEX SOCIETY [PUBLICATIONS]	P		
LITERARY MARKET PLACE.	P		
LITERATURE CRITICISM FROM 1400 TO 1800 - ONLINE	O		
LONDON REVIEW OF BOOKS (MICROFILM)	MF		
LOS ANGELES TIMES (DIGITAL MICROFILM)	O		
LOUISA COUNTY HISTORICAL MAGAZINE	P		
LOUISA COUNTY HISTORICAL SOCIETY. MEMBERSHIP	M		
LYNCH'S FERRY	P		
MAP AND CHART SERIES (GEOLOGICAL SOCIETY OF AMERICA)	P		
MARK TWAIN JOURNAL	P		
MARKET SHARE REPORTER - ONLINE	O		
MATRIX : A REVIEW FOR PRINTERS AND BIBLIOPHILES	P		
MONDE, LE (MICROFILM)	MF		

MOUNT VERNON, YESTERDAY, TODAY, TOMORROW	P		
MUSIKALISCHE WERKE / HRSG. IM AUFTRAG DER GESELLSCHAFT FÜR MUSIKFORSCHUNG. TELEMANN, GEORG PHILIPP	P		
NATURE PROTOCOLS	O		
NEONATAL NETWORK	O		
NEONATAL NETWORK	O		
NEUE AUSGABE SÄMTLICHER WERKE / JOHANNES BRAHMS	P		
NEUE AUSGABE SÄMTLICHER WERKE / SCHÜTZ, HEINRICH	P		
NEUE AUSGABE SÄMTLICHER WERKE. KRITISCHER BERICHT	P		
NEW ENGLAND HISTORIC AND GENEALOGICAL SOCIETY. INSTITUTIONAL MEMBERSHIP	M		
NEW ENGLAND HISTORICAL AND GENEALOGICAL REGISTER	P		
NEW REPUBLIC (MICROFILM)	MF		
NEW YORK REVIEW OF BOOKS (MICROFILM)	MF		
NEW YORK TIMES	N		
NEW YORK TIMES (DIGITAL MICROFILM)	O		
NEWPORT NEWS, VIRGINIA, POLK CITY DIRECTORY	P		
NEWSLETTER (LOUISA COUNTY HISTORICAL SOCIETY)	P		
NINETEENTH-CENTURY LITERATURE CRITICISM - ONLINE	O		
NOTICES OF THE AMERICAN MATHEMATICAL SOCIETY - ONLINE	O		
NOVUM - WORLD OF GRAPHIC DESIGN	P		
OPERA JOURNAL	P		
PALLADIAN	P		
PAPERS [THOMAS JEFFERSON]	P		
PEDIATRICS	O		
PHILOSOPHICAL QUARTERLY - ONLINE	O		
PHILOSOPHY AND MEDICINE	P		
PHYSICAL THERAPY	O		
PHYSICIAN AND SPORTS MEDICINE	O		
PLUCK! : THE JOURNAL OF AFFRILACHIAN ARTS & CULTURE	P		
POETRY CRITICISM - ONLINE	O		
POSTGRADUATE MEDICINE	O		
PULP & PAPER INTERNATIONAL	P		
PURE AND APPLIED MATHEMATICS	P		
RDA TOOLKIT	O		
REPORT OF INVESTIGATIONS / BUREAU OF ECONOMIC GEOLOGY, THE UNIVERSITY OF TEXAS AT AUSTIN	P		
RESOLUTIONS AND DECISIONS ADOPTED BY THE GENERAL ASSEMBLY [ADVANCE TEXT]	P		
RESOLUTIONS AND DECISIONS OF THE ECONOMIC AND SOCIAL COUNCIL	P		
RESOLUTIONS AND DECISIONS OF THE SECURITY COUNCIL	P		
RICHMOND TIMES DISPATCH	N		
RICHMOND TIMES DISPATCH (MICROFILM)	MF		
ROLLING STONE (MICROFILM)	MF		
SAEMTLICH WERKE.KRITISCHE GESAMTAUSGAE. WORKS OF ANTON BRUCKNER	P		
SÄMTLICHE WERKE / BERG, ALBAN	P		
SBORNIK: MATHEMATICS - ONLINE	O		
SCHWEIZER ARCHIV FÜR TIERHEILKUNDE (SAT)	O		
SCHWEIZER ARCHIV FÜR TIERHEILKUNDE (SAT)	P+O		
SCIENCE AND CHILDREN	O		
SHAKESPEAREAN CRITICISM - ONLINE	O		
SHORT STORY CRITICISM - ONLINE	O		
SIERRA	P		
SOUTHEASTERN GEOLOGY	P		
SOUTHERN LIVING	P		

SPEC KIT - ONLINE	O		
SPECIAL PAPERS / GEOLOGICAL SOCIETY OF AMERICA - ONLINE	O		
SPECIAL PAPERS IN PALAEOLOGY	P		
SPIE DIGITAL LIBRARY	DB		
SPIEGEL, DER	P		
SRDS	DB		
STANDARD & POOR'S LIBRARY REFERENCE SHELF 2	P		
STANDARD & POOR'S CAPITAL IQ INDUSTRY SURVEYS.	P		
STATE POLITICS & POLICY QUARTERLY	O		
STATIONERY OFFICE ANNUAL CATALOGUE	P		
STATISTICAL YEARBOOK / DEPARTMENT OF ECONOMIC AND SOCIAL INFORMATION AND POLICY ANALYSIS	P		
STUDI DANTESCHI.	P		
STUDIES IN MEDIEVAL AND REFORMATION TRADITIONS	P		
SUBSTANCE ABUSE	O		
SUPPLEMENT SERIES OF PROVERBIUM	P		
SYCAMORE REVIEW	P		
TEACHING OF SOCIOLOGY	O		
TWENTIETH-CENTURY LITERARY CRITICISM - ONLINE	O		
UNITED NATIONS DOCUMENTS AND PUBLICATIONS; UNITED NATIONS LAW LIBRARY COLLECTION [MICROFORM]	O		
USA TODAY (NEWSPAPER)	N		
VALUE LINE INVESTMENT SURVEY	DB		
VETERINARY AND COMPARATIVE ORTHOPAEDICS AND TRAUMATOLOGY : V.C.O.T	P+O		
VIRGINIA ENGLISH JOURNAL	P		
VIRGINIA GAZETTE	N		
VIRGINIA GAZETTE (MICROFILM)	MF		
VIRGINIAN PILOT	N		
WALL STREET JOURNAL	N		
WALL STREET JOURNAL (DIGITAL MICROFILM)	MF		
WASHINGTON POST	N		
WASHINGTON POST (DIGITAL MICROFILM)	MF		
WERKE / JOSEPH HAYDN	P		
WEST TEXAS GEOLOGICAL SOCIETY PUBLICATIONS	P		
WILLIAMSBURG, VIRGINIA, POLK CITY DIRECTORY	P		
WORKS OF HENRY PURCELL / REVISED	P		
WWD	DB		
YORK TOWN CRIER; THE POQUOSON POST	N		
GRAND TOTAL			

ADDENDUM # 1 TO RFP # 0041984

VIRGINIA POLYTECHNIC INSTITUTE AND STATE UNIVERSITY
Procurement Department (MC 0333)
 North End Center, Suite 2100, Virginia Tech
 300 Turner Street NW
 Blacksburg, Virginia 24061

DATE November 20, 2015	ORIGINAL DUE DATE AND HOUR December 1, 2015
-------------------------------	--

ADDRESS ALL INQUIRIES AND CORRESPONDENCE TO: Roger Gupta, CPPB, CUPO, VCO , Contracts Officer/Buyer Senior E-MAIL ADDRESS: ragupta@vt.edu TELEPHONE NUMBER (540) 231-4177 FAX NUMBER (540) 231-9628 AFTER HOUR MESSAGES (540) 231-6221

Comprehensive Library Serials Services

1. Please refer to Attachment D, which contains Vendor questions and Virginia Tech's responses
2. In Attachment C, the following titles were duplicated and are not to be priced twice. Please disregard the second occurrence of the following titles in Attachment C:

 American Journal of Critical Care
 Chemical & Engineering News
 Families in Society
 Journal of Nursing Education
 Neonatal Network
3. In Attachment C, the following title was misspelled: PALLADIAN and is hereby amended and restated to read: "PALLADIANA". Palladiana is published by the Center for Palladian Studies in America, Inc. and comes with membership in Center for Palladian Studies in America, Inc.
4. In Attachment C, the following title: AUGUSTA ANNALS was incorrectly identified as "P" print format; this is amended and restated to read "DB" as this title is an online database.
5. In Attachment C, the following title: "CLASSICAL AND MEDIEVAL LITERATURE CRITICISM – ONLINE" was incorrectly identified as "P" print format; this is amended and restated to read "O" as this title is an online serial.
6. The due date and hour is hereby changed to December 8, 2015 - 3 pm.
7. All other terms, conditions and descriptions remain the same.

FULL LEGAL NAME (PRINT) <small>(Company name as it appears with your Federal Taxpayer Number)</small>	FEDERAL TAXPAYER NUMBER (ID#)
BUSINESS NAME/DBA NAME/TA NAME <small>(If different than the Full Legal Name)</small>	FEDERAL TAXPAYER NUMBER <small>(If different than ID# above)</small>
BILLING NAME <small>(Company name as it appears on your invoice)</small>	FEDERAL TAXPAYER NUMBER <small>(If different than ID# above)</small>
PURCHASE ORDER ADDRESS	PAYMENT ADDRESS

CONTACT NAME/TITLE (PRINT)		SIGNATURE (IN INK)	DATE
E-MAIL ADDRESS	TELEPHONE NUMBER	TOLL FREE TELEPHONE NUMBER	FAX NUMBER TO RECEIVE E-PROCUREMENT ORDERS

Revised 12/15/2014

Attachment D

Vendor Q&A

1. **Vendor Question:**

Please provide circulation information for all the newspapers, i.e., mail or carrier and days of week required.

Virginia Tech Response:

Newspapers should be delivered by mail and for all available days (Monday—Sunday).

2. **Vendor Question:**

Is this for subscription year 2016 or 2017?

Virginia Tech Response:

The description in NOTE: at the top of Attachment C says 2016.

3. **Vendor Question:**

Did the list mean AMERICAN MATHEMATICAL SOCIETY TRANSLATIONS or TRANSACTIONS? Reference Attachment C.

Virginia Tech Response:

American Mathematical Society Translations, ISSN 0065-9290.

4. **Vendor Question:**

Please confirm that this RFP is not intended to solicit proposal for online aggregated databases; e.g. topical or multidisciplinary databases including hundreds to thousands of titles which may or may not be serial titles.

Virginia Tech Response:

This RFP is intended to solicit proposal for online aggregated databases. Subscriptions to online aggregated databases are considered serial or ongoing in nature, and therefore would be covered.

5. **Vendor Question:**

a. Will this award be a single or multi-vendor award?

b. If the award is a multi-award, will Universities have a choice of which contractor to utilize?

c. If it does become a multi-award situation, will there then be a primary designated contractor as there was in the last contract?

Virginia Tech Response:

a. *Virginia Tech will make a decision to award a single contract to one offeror or multiple contracts to multiple offerors based on the strength of proposals received and with regard to the evaluation criteria utilized in the RFP. If a single offeror clearly has the best proposal, the award may be to that offeror.*

b. *In the event of a multi-award, each VASCUPP University will have its choice of the contractor(s) that best suits its respective need.*

c. *There was not a primary designated contractor in the last contract, however, Virginia Tech chose to do the greater part of its business with the offeror that provided the best deal for the University.*

6. **Vendor Question:**

We at YBP are wondering about the advisability and/or necessity of responding to the subject RFP given that we currently hold James Madison University (JMU) contract UCPJMU4070 which includes terms for continuations (serials), print and electronic. While it is apparent that this newer contract would extend beyond the expiration of UCPJMU4070, it also seems possible that a new RFP for "all" monographic services similar to UCPJMU4070 would be likely issued upon its expiration. Please help us understand this new RFP in light of the existing contract YBP has with VASCUPP.

Virginia Tech Response:

The intent of JMU contract UCPJMU4070 is to cover monographic (book) services; as opposed to this RFP written to cover serial (journal) services. UCPJMU4070 mentions "continuations (serials), print and electronic" because sometimes a series of monographs can be called serials and sometimes one special volume or issue of a serial can stand alone as a monograph. At the expiration of UCPJMU4070, there will be another RFP for "all" monographic services created.

7. **Vendor Question:**

Under ADDITIONAL GOODS and SERVICES, what types of goods and services are considered? Reference Attachment A.

Virginia Tech Response:

Additional Goods and Services can include any product or service the offeror normally sells to include any introduced after the contract begins.

8. **Vendor Question:**

In Attachment C – Serial Pricing, the abbreviations for format include "N" for some newspaper titles. What format is expected for titles listed with "N" as the format?

Virginia Tech Response:

The format expected for titles listed with "N" as the format is print.

9. **Vendor Question:**

In Attachment C, please clarify that the format in the title description, rather than the abbreviation, is the desired format.

10. **Virginia Tech Response:**

The format in the title description, rather than the category abbreviation, is the desired format.

11. **Vendor Question:**

Since the number of titles and the value of the subscriptions, including average cost of a subscription, are some of the factors used to determine the service charge, please provide the number of subscriptions and the dollar value of the title list to be placed with a subscription agent.

Virginia Tech Response:

*The purpose of Attachment C -- Sample Pricing is to gauge an offeror's pricing for the **purely hypothetical pricing scenario** described in the NOTE and title list in Attachment C. The listing in Attachment C is in **no way** representative of an actual title list, but instead represents a random sample listing of titles that each VASCUPP University may have purchased or desires to purchase.*

The expectation of the evaluation committee is that the offeror will present its best pricing possible for the titles listed in Attachment C.

Compiling an actual title list to be placed with a subscription agent with the variables requested is not being requested at this stage of the RFP.

VASCUPP institutions as well as other academic institutions and agencies of the Commonwealth of Virginia will participate in any resulting contract(s) and pricing should be provided with this increased volume in mind. The offeror providing the best deal should see increased business from the VASCUPP Universities.

12. **Vendor Question:**

Not being the vendor of record, we do not have access to your title list that is handled by your current subscription agent. The current agent has the advantage. A copy of the complete title list for an agent with ISSNs, format and publisher would greatly assist us in preparing a better offer. Is it possible to supply a title list?

Virginia Tech Response:

Compiling an actual title list to be placed with a subscription agent with the variables requested is not being requested at this stage of the RFP.

The purpose of Attachment C -- Sample Pricing is to gauge an offeror's pricing for the hypothetical scenario described in the NOTE in Attachment C. Please provide your best pricing possible.

As this is a hypothetical pricing scenario, there is no advantage for holding a title list.

13. **Vendor Question:**

Are e-journal packages, (Springer, Taylor & Francis, Wiley) part of this RFP for Virginia Tech?

Virginia Tech Response:

Yes.

14. **Vendor Question:**

Will the subscription agent be able to handle the invoicing for these packages?

Virginia Tech Response:

Yes.

15. **Vendor Question:**

Can you provide the e-deals that Virginia Tech has licensed, including number of titles and value?

Virginia Tech Response:

No.

16. **Vendor Question:**

Are the e-deals through a consortium such as VIVA?

Virginia Tech Response:

This is what VIVA has licensed: <http://www.vivalib.org/licensed/vendorsindex.php>

17. **Vendor Question:**

Below is the eVA invoice fee schedule. Please confirm that this is the fee schedule that will be applied to purchase orders issued to contractors who have been awarded with a contract resulting from this RFP.

Supplier Transaction Fees

07/01/2014 or Later eVA Registered, DMBE*-Certified Small Businesses 1%, Capped At \$500 Per Order

07/01/2014 or Later eVA Registered Businesses That Are NOT DMBE* Certified Small Businesses 1%, Capped At \$1,500 Per Order

Virginia Tech Response:

Yes this is the fee schedule that will be applied to any resulting contract. Offerors must register with Virginia's eVA system in order for a contract to be awarded.

18. **Vendor Question:**

Is the complete subscription list considered one order so that the fee will be no more than \$1500 per year?
Virginia Tech Response:

Virginia Tech Response:

The 1% fee for an EVA registered vendor will be determined by the amount shown on any PO issued to the contractor.

19. **Vendor Question:**

Where should the financial proposal appear in the response?

Virginia Tech Response:

Please reference Section VII.A.2.c. Page 10 of the RFP. Responses should be presented in the same order as the requirements appear in the RFP.

20. **Vendor Question:**

Regarding the title list in Attachment C, please clarify the titles AUGUSTA ANNALS and AUGUSTA HISTORICAL BULLETIN.

Virginia Tech Response:

These are separate titles and should each be priced accordingly.

The Augusta Historical Bulletin is an annual print publication that libraries receive when they pay for a membership in the Augusta County [Virginia] Historical Society and has been published continuously since 1965. From the first issue until 1999, the journal was published semi-annually, in the spring and the fall, and was a smaller, saddle-stitched publication. Beginning in 2000, the society has gone to a larger, annual publication that is perfect bound, meaning it has a spine. The Bulletin ranges in length from 125-200 pages depending upon the number of manuscripts and illustrations that have been submitted.

"Augusta Annals" is the common name for "Annals of Augusta County, Virginia, from 1726 to 1871". This is an open access database located at: <https://archive.org/details/annalsofaujustac00wadd>.

21. **Vendor Question:**

Regarding the title list in Attachment C, BACH, is this title published by [Berea, Ohio] Riemenschneider Bach Institute, Baldwin-Wallace College ISSN: 0005-3600? Please confirm.

Virginia Tech Response:

Yes.

22. **Vendor Question:**

Regarding the title list in Attachment C, BANK DIRECTORY, please clarify which Bank Directory.

Virginia Tech Response:

The Bank Directory published by Accruity.

23. **Vendor Question:**

Regarding the title list in Attachment C, CODE OF VIRGINIA, 1950. WITH PROVISIONS FOR SUBSEQUENT POCKET PARTS, is this Michie's published by Lexis-Nexis or the one published by West?

Virginia Tech Response:

Published by West.

24. **Vendor Question:**

Regarding the title list in Attachment C, for DAILY PRESS N (NEWSPAPER), is this the one published in Newport News, VA?

Virginia Tech Response:

Yes.

25. **Vendor Question:**

Regarding the title list in Attachment C, DAILY PRESS MF (DIGITAL MICROFILM), is this the one published in Newport News, VA?

Virginia Tech Response:

Yes.

26. **Vendor Question:**

Regarding the title list in Attachment C, for INDEX TO PROCEEDINGS OF THE GENERAL ASSEMBLY, what service do you require?

Virginia Tech Response:

The service that a vendor would provide for a freely-available or open access title.

27. **Vendor Question:**

Regarding the title list in Attachment C, INDEX TO PROCEEDINGS OF THE SECURITY COUNCIL, what service do you require?

Virginia Tech Response:

The service that a vendor would provide for a freely-available or open access title.

28. **Vendor Question:**

Regarding the title list in Attachment C, JOURNALS OF THE HOUSE OF COMMONS, are you referring to the ProQuest (formerly Chadwyck-Healey) version of this? Please confirm.

Virginia Tech Response:

Yes.

29. **Vendor Question:**

Regarding the title list in Attachment C, for KRITISCHE BERICHTE / WOLFGANG AMADEUS MOZART, the set is complete and no more volumes are to be published. What service do you require?

Virginia Tech Response:

The service that a vendor would provide for a completed monographic set.

30. **Vendor Question:**

Regarding the title list in Attachment C, for NEUE AUSGABE SÄMTLICHER WERKE. KRITISCHER BERICHT, please clarify the composer being requested.

Virginia Tech Response:

Bach, Johann Sebastian, 1685-1750.

31. **Vendor Question:**

Regarding the title list in Attachment C, for RESOLUTIONS AND DECISIONS ADOPTED BY THE GENERAL ASSEMBLY [ADVANCE TEXT], what service do you require?

Virginia Tech Response:

The service that a vendor would provide for a freely-available or open access title.

32. **Vendor Question:**

Regarding the title list in Attachment C, RESOLUTIONS AND DECISIONS OF THE ECONOMIC AND SOCIAL COUNCIL, what service do you require?

Virginia Tech Response:

The service that a vendor would provide for a freely-available or open access title.

33. **Vendor Question:**

Regarding the title list in Attachment C, for RESOLUTIONS AND DECISIONS OF THE SECURITY COUNCIL, what service do you require?

Virginia Tech Response:

The service that a vendor would provide for a freely-available or open access title.

34. **Vendor Question:**

Regarding the title list in Attachment C, for SCHWEIZER ARCHIV FÜR TIERHEILKUNDE (SAT) 1st copy, what pricing should be provided?

Virginia Tech Response:

Online pricing.

35. **Vendor Question:**

Regarding the title list in Attachment C, SCHWEIZER ARCHIV FÜR TIERHEILKUNDE (SAT) 2nd copy, what pricing should be provided?

Virginia Tech Response:

Print + Online pricing.

36. **Vendor Question:**

Regarding the title list in Attachment C, for UNITED NATIONS DOCUMENTS AND PUBLICATIONS; UNITED NATIONS LAW LIBRARY COLLECTION, are you referring to the Readex microfiche version? The title is Microform but the format is Online. Is only the Law Library Collection being requested? Please confirm.

Virginia Tech Response:

Yes, this title is the Readex microfiche. Yes, the pricing request was for the Law Library Collection only.

37. **Vendor Question:**

What is the price of the Journal of the American Dental Association (JADA) that Elsevier provided to Virginia Tech?

Virginia Tech Response:

\$1,034.00 for the 2016 subscription.

38. **Vendor Question:**

What is the price of the 6-title Journal of Visualized Experiments (JoVE) package that JoVE provided to Virginia Tech?

Virginia Tech Response:

All six journals for the rate of \$23,425.00 for the 2016 subscription.

39. **Vendor Question:**

Please clarify the following item:

[From Section VII.B.2.e.iii.] Describe how the system compiles and links statistics with payment data.

Virginia Tech Response:

The service sought is the vendor's capability to link subscription payment information with user's usage statics to determine cost-per-use for the subscribed resource.

40. **Vendor Question:**

Reference Section VII.B.2.i: Describe any 24-hour reporting and response ticketing system. Please clarify if this refers to rush situations such as loss of access or IT reported bugs.

Virginia Tech Response:

Yes, this refers to a reporting and response ticketing system where customers would report urgent or rush situations such as loss of access from subscribed materials or inability to access subscription years.

201 Village Road Shallotte, NC 28470

Tel: 800.571.9554

Fax: 910.755.6274

www.wtcox.com

December 4, 2015

Roger Gupta
Virginia Polytechnic Institute and
State University (Virginia Tech)
Procurement Department (MC 0333)
North End Center, Suite 2100
300 Turner Street NW
Blacksburg, Virginia 24061

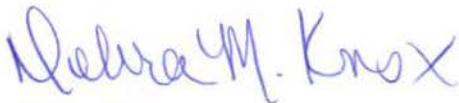
RE: Request for Proposal #0041984
Comprehensive Library Serials Services

Dear Mr. Gupta,

Thank you for the opportunity to provide a response to the above referenced proposal. WT Cox Information Services shall comply with the requirements, provisions, terms and conditions specified in the above referenced RFP.

Please do not hesitate to contact me during the evaluation process should you have additional questions.

Cordially,



Debra M. Knox
Director, Contract Administration



Request for Proposal #0041984

for

Comprehensive Library Serials Services

October 28, 2015

RFP 0041984
GENERAL INFORMATION FORM

1. **QUESTIONS:** All inquiries for information regarding this solicitation should be directed to: Roger Gupta, CPPB, CUPO, VCO, Phone: (540) 231-4177, e-mail: ragupta@vt.edu.
2. **DUE DATE:** Sealed Proposals will be received until December 1, 2015 at 3:00 PM. Failure to submit proposals to the correct location by the designated date and hour will result in disqualification.
3. **ADDRESS:** Proposals should be mailed or hand delivered to: Virginia Polytechnic Institute and State University (Virginia Tech), Procurement Department (MC 0333) North End Center, Suite 2100, Virginia Tech, 300 Turner Street NW, Blacksburg, Virginia 24061. Reference the Opening Date and Hour, and RFP Number in the lower left corner of the return envelope or package.
4. **TYPE OF BUSINESS:** (Please check all applicable classifications). If your classification is certified by the Virginia Department of Small Business and Supplier Diversity (SBSD), provide your certification number: [REDACTED]. For assistance with SWaM certification, visit the SBSB website at <http://www.dmbv.virginia.gov/>.


___ **Large**

Small business – An independently owned and operated business which, together with affiliates, has 250 or fewer employees or average annual gross receipts of \$10 million or less averaged over the previous three years. Department of Minority Business Enterprise (DMBE) certified women-owned and minority-owned business shall also be considered small business when they have received DMBE small business certification.

___ **Women-owned business** – A business concern that is at least 51% owned by one or more women who are U. S. citizens or legal resident aliens, or in the case of a corporation, partnership, or limited liability company or other entity, at least 51% of the equity ownership interest is owned by one or more women who are citizens of the United States or non-citizens who are in full compliance with the United States immigration law, and both the management and daily business operations are controlled by one or more women who are U. S. citizens or legal resident aliens.

___ **Minority-owned business** – A business concern that is at least 51% owned by one or more minority individuals (see Section 2.2-1401, Code of Virginia) or in the case of a corporation, partnership, or limited liability company or other entity, at least 51% of the equity ownership interest in the corporation, partnership, or limited liability company or other entity is owned by one or more minority individuals and both the management and daily business operations are controlled by one or more minority individuals.

5. **COMPANY INFORMATION/SIGNATURE:** In compliance with this Request For Proposal and to all the conditions imposed therein and hereby incorporated by reference, the undersigned offers and agrees to furnish the services in accordance with the attached signed proposal and as mutually agreed upon by subsequent negotiation.

FULL LEGAL NAME (PRINT) <small>(Company name as it appears with your Federal Taxpayer Number)</small> Cox Subscriptions, Inc.		FEDERAL TAXPAYER NUMBER (ID#) [REDACTED]	
BUSINESS NAME/DBA NAME/TA NAME <small>(If different than the Full Legal Name)</small> WT Cox Information Services		FEDERAL TAXPAYER NUMBER <small>(If different than ID# above)</small>	
BILLING NAME <small>(Company name as it appears on your invoice)</small> WT Cox Information Services		FEDERAL TAXPAYER NUMBER <small>(If different than ID# above)</small>	
PURCHASE ORDER ADDRESS 201 Village Road Shallotte, NC 28470		PAYMENT ADDRESS 201 Village Road Shallotte, NC 28470	
CONTACT NAME/TITLE (PRINT) Debra M. Knox, Director of Contract Administration		SIGNATURE (IN INK) 	DATE 12-4-2015
E-MAIL ADDRESS dknox@wtcox.com	TELEPHONE NUMBER 910-754-3145 X215	TOLL FREE TELEPHONE NUMBER 800-571-9554 Ext. 215	FAX NUMBER TO RECEIVE E-PROCUREMENT ORDERS 877-755-6274

Orders are also accepted at orders@wtcox.com

2/6/2015

ADDENDUM # 1 TO RFP # 0041984

VIRGINIA POLYTECHNIC INSTITUTE AND STATE UNIVERSITY
Procurement Department (MC 0333)
 North End Center, Suite 2100, Virginia Tech
 300 Turner Street NW
 Blacksburg, Virginia 24061

DATE November 20, 2015	ORIGINAL DUE DATE AND HOUR December 1, 2015
-------------------------------	--

ADDRESS ALL INQUIRIES AND CORRESPONDENCE TO: Roger Gupta, CPPB, CUPO, VCO , Contracts Officer/Buyer Senior E-MAIL ADDRESS: ragupta@vt.edu TELEPHONE NUMBER (540) 231-4177 FAX NUMBER (540) 231-9628 AFTER HOUR MESSAGES (540) 231-6221

Comprehensive Library Serials Services

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7. All other terms, conditions and descriptions remain the same.

FULL LEGAL NAME (PRINT) <small>(Company name as it appears with your Federal Taxpayer Number)</small> Cox Subscriptions, Inc.	FEDERAL TAXPAYER NUMBER (ID#) ██████████
BUSINESS NAME/DBA NAME/TA NAME <small>(If different than the Full Legal Name)</small> WT Cox Information Services	FEDERAL TAXPAYER NUMBER <small>(If different than ID# above)</small>
BILLING NAME <small>(Company name as it appears on your invoice)</small> WT Cox Information Services	FEDERAL TAXPAYER NUMBER <small>(If different than ID# above)</small>
PURCHASE ORDER ADDRESS 201 Village Road Shallotte, NC 28470	PAYMENT ADDRESS 201 Village Road Shallotte, NC 28470

CONTACT NAME/TITLE (PRINT) Debra Knox, Director of Contract Administration		SIGNATURE (IN INK) <i>Debra M Knox</i>		DATE 12-4-2015
E-MAIL ADDRESS dknox@wtcox.com	TELEPHONE NUMBER 910-754-3145 Ext. 215	TOLL FREE TELEPHONE NUMBER 800-571-9554 Ext. 215	FAX NUMBER TO RECEIVE E-PROCUREMENT ORDERS 877-755-6274	

Revised 12/19/2014

Orders may also be sent to orders@wtcox.com



STATEMENT OF NEEDS

A. General

WT Cox Information Services shall provide comprehensive services for print and electronic periodicals, continuations, publishers' series, online databases and other electronic resources, and continuing titles (hereafter referred to as serials) for higher education institutions and other agencies of the Commonwealth of Virginia. Services shall include the provision of all serials, orders, renewals, cancellations, handling of claims, and invoicing.

B. Customer Service

1. WT Cox Information Services shall assign a specific in-house account representative to handle the University's orders, cancellations, claims, requests for reports, invoicing questions, etc. The in-house representative shall respond to all inquiries within one (1) business day, e-mail preferred. The representative assigned to this opportunity will be Mary Brasfield.

2. Sales representatives as well as the assigned customer service team leader, Ms. Brasfield shall visit the University, upon request and at intervals agreeable to both parties, to discuss service to the University's account and other serials management issues.

3. WT Cox Information Services provides toll-free telephone numbers, fax numbers, and e-mail addresses for all staff assigned to the University's account. Additionally, we provide a web-based customer interface for all staff assigned to the University's account.

4. WT Cox Information Services shall maintain accurate and current records of the University's active serials orders in our web-based customer interface that includes an online catalog and subscription management features.

5. WT Cox Information Services shall act as the liaison to publishers on behalf of the consortia as a whole or individual Universities dependent on award. We shall handle correspondence with publishers in regard to duplication, cancellations, claims, address changes, adjustments, and other service communications such as title migrations and publisher changes.

C. Orders

1. For new orders in an online format, WT Cox Information Services will acknowledge new orders within two (2) business days and access permissions to the title should be delivered to the University within ten (10) business days of order submission to publisher.
2. For new orders in print format, the first issue of a new order should be delivered to the University within eight (8) weeks for North American publishers and ten (10) weeks for other publishers, or when the University has designated that the next volume should begin. Delivery may also be dependent on publisher schedule.
3. New orders and payments to publishers shall be released to publishers within ten (10) days of receipt of a new order.
4. Renewal orders and payments to publishers shall be released to publishers sixty (60) days prior to the expiration date of renewed subscriptions.
5. WT Cox Information Services shall accept new orders from the University at any time during the year. These orders shall be merged into the next main renewal invoice.
6. The University will specify the beginning issue and/or start date of a new subscription order. Unless otherwise indicated, the latest edition published is to be supplied.
7. WT Cox Information Services shall accept subscription orders on the annual renewal list invoice as automatic renewals to run until not renewed expressly by the University or otherwise cancelled.
8. WT Cox Information Services shall provide special and priority handling of rush orders.
9. If part of the paid subscription, all indexes, supplementary numbers, and added volumes shall be serviced automatically as part of the subscription. WT Cox Information Services shall notify the University, of supplementary items not included as part of the subscription, and indicate handling procedures for the same.

10. If unable to supply a title, WT Cox Information Services shall notify the University within thirty (30) days for North American publishers and forty-five (45) days for other publishers.

11. Order substitutions or additions of titles shall not be permitted unless expressly authorized by the University on a title-by-title basis.

12. WT Cox Information Services shall alert the University, of the presence of any license agreements before placing the order with the publisher.

13. WT Cox Information Services shall provide a common expiration date of December 31 unless otherwise indicated by the library or publisher.

14. On the Order Invoice WT Cox Information Services shall include assigned fund codes and the University's order record number.

15. WT Cox Information Services shall alert the University to the possibility of online availability, any changes in the current online availability, and changes made to pricing models.

16. WT Cox Information Services shall maintain for up to five (5) years full and complete records of all financial transactions processed for the University and, upon request, supply records to the University.

D. Subscription Renewals

1. WT Cox Information Services shall notify the University of excessive price increases from the base price on the last renewal invoice before the order is placed with the publisher at benchmarks set by the University (e.g., over \$500 or 100% price increases).

2. WT Cox Information Services shall supply a list of all subscribed titles for renewal, including fund code, order number, renewal date, the University's order record number, title format, and estimated price. WT Cox Information Services shall provide the renewal list in the format(s) designated by the University, (e.g., printed, PDF, or spreadsheet).

3. The University reserves the right to not renew orders. The University may indicate non-renewal by lining off on the annual renewal invoice, selecting no in WT Cox Information Services' online renewal module, or by contacting customer service representative in order to prevent renewal for the subsequent periods.

4. On the renewal list, WT Cox Information Services shall alert the University to any changes in a title's format that may impact availability.

E. Claims

1. WT Cox Information Services provides a flexible, fast, and effective online claims service with reporting and reclaiming assistance features, including bibliographic and financial information. The University may claim missing issues through WT Cox Information Services or directly from the publisher

2. The University will submit claims to WT Cox Information Service's representative and/or via our exclusive online claiming module.

3. WT Cox Information Services shall submit claims to the publisher within five (5) business days of receipt from the University.

4. WT Cox Information Services shall notify the University, of the status of all outstanding claims via a monthly report. Your customer service team leader and supporting clerical staff shall also respond to individual requests for claims status.

5. On claims for missing issues submitted by the University within the publisher's specified time period, WT Cox Information Services shall secure replacements free of charge or provide a credit to cover the cost for purchasing the missing issues.

F. Cancellations

1. WT Cox Information Services shall cancel individual titles at any time during the subscription year when notified by the University, based on publisher restriction.

2. The effective date of cancellation will be determined by the University, except in the case of publishers' restrictions.

3. WT Cox Information Services shall acknowledge receipt of the University's cancellation notice via e-mail, letter, or regular report. Cancelled titles shall be deleted from further renewal lists and invoices.

4. WT Cox Information Services shall request refunds of any unexpired portions of orders. Refund credits for the full amounts refunded by the publishers shall be refunded to the University.

5. The University reserves the right to cancel any renewal that has increased from the base price on the last renewal invoice over the benchmark established by the University (e.g., over \$500 or 100% price increase) even if not advised of price increase before the renewal is placed with the publisher.

G. Contractor's Serials Management System

1. WT Cox Information Services provides an online serials management system (System) for maintaining serials subscription functions such as ordering, claiming, invoicing, financial, and title and subscription verification.

2. WT Cox Information Services shall maintain accurate and current records of the University's active serials orders in the System.

3. WT Cox Information Services shall maintain at least three years of the University's subscription data.

4. System records shall provide comprehensive data on each title including, but not limited to:

- a. Title, publisher, and ISSN
- b. Available formats
- c. Available packages and memberships with relationships to title clearly delineated
- d. The University's Integrated Library System (ILS) data (fund codes, order number)
- e. Account numbers
- f. Active subscription data (most recent invoice, subscription cycle, term, order status)
- g. Online Title registration information for third party platforms
- h. Publisher's registration identification number
- i. Licensing information
- j. Links to URL for online access

5. WT Cox Information Services shall provide the University with the administrative and technical support to perform online subscription management operations including, but not limited to, direct transmission of online orders, electronic claiming, and report generation.

6. WT Cox Information Services shall provide the University with the ability to search the System to determine availability, price, and other variables prior to placement of an order. WT Cox Information Services shall provide training on how to use the System at no additional charge to the University.

H. Reports

1. WT Cox Information Services shall make the monthly report data available online and, upon request, in print. These monthly reports to include, but not be limited to, the following:

- a. Price increase alerts
- b. Pricing model change alerts
- c. Format changes / format options
- d. Ceased publications
- e. Suspended publications
- f. Publication delays
- g. Publishing frequency changes
- h. Publisher changes
- i. Title changes
- j. Title mergers and splits
- k. New volumes
- l. Titles and issues claimed
- m. Titles that can no longer be supplied
- n. Membership or combination subscription changes
- o. Titles recently cancelled by the University
- p. Electronic availability (for new orders only)

2. WT Cox Information Services shall supply fiscal and collection management reports free of charge as requested. Fiscal and collection management report data shall be made available online. These reports to include, but not be limited to, the following:

- a. Average total of all Contractor charges (service, handling, etc.)
- b. Individual Contractor charges (service, handling, etc.)
- c. Subscriptions listed by Library of Congress classification or title
- d. Total expenditures by subject classification
- e. Number of claims submitted
- f. Number of claims resolved
- g. List of membership and combination titles
- h. Complete records of all financial transactions processed for the University
- i. Current titles on order, title prices and current price adjustments, frequencies, quantities, invoice identification, and unique library-specified codes.

A great deal of the information requested in Section H. Reports is made readily available through Coxnet, our web-based customer interface via our Notifications Tab. Some sample reports and screenshots have been provided as requested. Custom reports for any specified data parameters are always available on demand and at no charge.

3. WT Cox Information Services shall regularly notify the University, of the availability of supplementary materials related to subscriptions, i.e. supplements and special issues not included in the main subscription.

4. WT Cox Information Services shall provide custom fiscal and collection management reports in a timely manner as requested by the University. Reports should be provided in spreadsheet format.

I. Pricing

WT Cox Information Services understands, acknowledges and accepts that the University reserves the right to obtain supporting documentation on prices from us at any time during the contract period.

J. Invoicing

1. The following information shall appear on each invoice:

Name and address of the Contractor
The University bill-to address
The University ship-to address

The University account number assigned by the Contractor
The University's purchase order number
The University's ILS order record number for each title
Title (include a breakdown of titles which are parts of memberships, combinations, or series)
Publisher
Frequency
Number of copies being ordered for each subscription
ISSN
Period covered (inclusive dates)
Volume number (beginning with new title)
Price
Service charge, if any
Shipping and handling fees
Summary page detailing total prices, total additional charges (if any), and net total
The University's ILS fund code
Format

2. Supplemental Invoices:

WT Cox Information Services shall supply monthly supplementary invoices for titles on which the publisher price exceeded the originally billed publisher's price with reasons for additional charges. The supplementary invoice shall also include any credits to the University's account that result from overcharges, cancellations or cessations of a subscription.

3. Separate Invoices. WT Cox Information Services shall supply separate invoices as requested by the University.

4. WT Cox Information Services shall supply invoices in printable electronic format to the attention of the University's invoice processing designee(s).

5. WT Cox Information Services has the capability to transmit Electronic Data Interchange (EDI) transactions with a variety of ILS environments.

6. WT Cox Information Services shall supply, upon request, proof of payments made to publishers.

7. WT Cox Information Services shall provide invoices at the title level detail and title by title pricing for multi-title packages (bundled orders and 'Big Deal' packages) wherever possible.

8. WT Cox Information Services shall issue a check to the University, for all outstanding credits at the end of the contract period.

K. Shipments

1. Delivery of all materials shall be made FOB destination inside the University's premises as specified by the University.

2. The University shall not be held responsible for shipments lost in transit or otherwise not received. WT Cox Information Services shall provide replacement copies at no charge for defective, mutilated, or damaged issues, or those that are not delivered within publisher policies.

L. Other

1. Upon request, WT Cox Information Services shall provide the University with trial access to future serials management services and modules and other related peripheral services as they are developed.



Virginia Tech
Response to RFP #0041984
For Comprehensive Library Serials Services

December 8, 2015

Debra M. Knox
Director of Contract Administration
201 Village Road
Shallotte, NC 28470
dknox@wtcox.com
800-571-9554, Ext. 215

SPECIFIC REQUIREMENTS

1. Ability to Provide Services:

- a) Explain how the offeror is a prime serials vendor dealing directly with serial publishers.**

Cox Subscriptions, Inc. doing business as WT Cox Information Services is headquartered in coastal North Carolina, and is geographically centered between Wilmington, North Carolina and Myrtle Beach, South Carolina. WT Cox Information Services is fully staffed and provides all personnel, facilities, equipment, supplies, software and appropriate interfaces for the placement and ongoing management of new and renewal subscriptions, both foreign and domestic.

WT Cox Information Services was established in 1974 and formally incorporated in 1982. WT Cox Information Services is privately held and has been under the same ownership since inception offering product and collection management services. WT Cox Information Services has no parent company or outside investment firms. WT Cox Information Services is a U.S. based small business with sixty full time employees and seasonal temporary staff during heavy workload periods. We remain under the same original ownership of Mr. Willard T. Cox, his successors and his staff of industry leaders with carefully controlled business development. WT Cox Information Services employs a well-experienced and refined group of professionals with a diverse background in business information technology and the library industry.

WT Cox Information Services is well known for the level of service commitment to our libraries. Large projects include service to entire library systems comprised oftentimes of hundreds of separate entities. These include academic campuses, corporate offices, public library systems and government agencies worldwide, including Department of Defense contracts from all military branches. WT Cox Information Services is responsible for the transition of current collections with major publishers based on the high standards invoked by the Audit Bureau of Circulation, which governs practices and procedures of legitimate subscription agencies. WT Cox Information Services is a full service subscription agency with membership to American Library Association, Special Library Association and Public Library Association. We adhere strictly to industry standards of excellence for subscription agents.

With a deep heritage of serials experience from our leadership, WT Cox Information Services is well placed as a full service subscription agency. Currently serving nearly 30,000 libraries worldwide, we take great pride in the reputation we have built as being a high-end service

provider. When it comes to quick, efficient, accurate and reliable resolve, libraries have looked to our dependable service for years.

We are fully staffed with a team of professionals available to work in close conjunction with you and your library staff to coordinate package deals with publishers as necessary, assist in electronic accessing issues and manage serials collections from beginning to end. WT Cox Information Services employs senior management personnel with extensive expertise in this area from both responsibilities at WT Cox Information Services and prior experience with large agencies.

WT Cox Information Services is a financially sound corporation with a strong management team and competent employees. With a successful history in the subscription marketplace of more than forty years, we have a solid record of providing excellent service and pricing options. WT Cox Information Services offers an unheard level of service and flexibility to assist in transition of service and will tailor our systems to meet your needs.

OUR PROMISE TO YOU

We promise to exhaust all administrative remedies in the pursuit of service to you. WT Cox Information Services prides itself on the high level of customer service we provide to our customers. Our goal is to achieve 100% satisfaction. While serials tend to be a problematic arena, our staff is totally committed to quality of services and on-time delivery. We understand the importance of libraries ability to provide service to their patrons. We work in the background to help you serve your clients. We will become your extra clerical support for issues of collection management. WT Cox Information Services provides the most cost efficient process in the industry and will help you to streamline delivery of library product and drive down the cost of doing business. WT Cox Information Services provides transition services by knowledgeable industry professionals. Finally, education and training will be the key to successful interaction between your vendor and your staff. We are committed to being the vendor you come to trust and rely on in your library.

WHAT WE DO

WT Cox Information Services is a full service subscription agency. WT Cox Information Services will service periodical, serials, publishers' series, and continuing titles (continuations), both domestic and foreign. We offer a full range of print, digital delivery, print plus online and online only titles specified, both foreign and domestic. Basic service will include the acquisition and delivery of all new orders, renewals, late renewals, back issues, transfer renewals, added copy

subscriptions, special orders, memberships and associated publications. Publications shall include, but not be limited to journals, periodicals, newspapers, annuals, yearbooks, government publications, microforms, monographic series, society proceedings and Congresses. WT Cox Information Services provides, as part of basic service, a web-based customer interface, acquisition of periodicals, both print and electronic, prepayment to publishers to guarantee delivery, invoicing, and management reports as well claiming and final problem resolution for all acquisitions and deliveries.

WT Cox Information Services offers libraries the full range of subscription services. Our services include a complete series of management reports, automated subscription services and online ordering, searching and claiming capabilities via the Worldwide Web. No additional hardware is required. WT Cox Information Services provides all services related to serial collection supply and management. We pride ourselves on our excellent customer service.

Our internal systems are open architecturally and can accommodate multiple shipping addresses and departmental indications under one billing address. All documents such as renewals, invoices and management reports can be delivered for each individual location as required, in both print and electronic format. Personnel have access to all serials management documents via the internet.

SUMMARY OF BASIC SERVICE

- Up to date and accurate information on more than 300,000 titles, current, domestic and foreign in all media available
- Established long term relationships with more than 10,000 publishers worldwide.
- Flexible invoicing based on your specific collection and requirements
- Renewals and invoices in both print and electronic format. Also available in ILS interface
- Transition and Account Management Team
- One point of contact customer service representative for day to day interactions
- Electronic Access Assistance
- CoxNet – our exclusive, easy to use customer interface
- Up to the minute online details about your collection, including bibliographic changes, online access details and order details
- MARC records are available at a minimum charge
- Online tools that allow you to analyze your serials collections, expenditures, management information and subject coverage
- Customized reports that contain the data points you specify

- b) **Provide the approximate number of serial publishers for which service is supplied.**

WT Cox Information Services has long term and productive relationships with approximately 10,000 publishers including domestic and foreign business partners.

- c) **Provide the approximate number of serial titles currently supplied.**

WT Cox Information Services can provide approximately 300,000 titles, both foreign and domestic in all media available through agencies.

- d) **Describe the offeror's ability to provide and service serials subscriptions from domestic and non-U.S. publishers, and from commercial and noncommercial publishers. Be sure to mention exceptions and exclusions.**

MEETING TITLE OBJECTIVES

WT Cox Information Services provides serial collection management services to acquire a full range of publications to include all periodicals available through agents. Service covers titles, in all media, both domestic and foreign. In certain instances, library staff may be solicited for information necessary to locate publications not commonly available. WT Cox Information Services has over 300,000 titles in our database with long-term viable relationships with more than 10,000 publishers. In the event that titles are not currently included in the database, WT Cox Information Services' in-house Title Information Department will secure information and make publication available to ordering library. Subscription services shall include new and renewal orders.

WT Cox Information Services shall supply materials from a wide range of publishers, to include:

- a. Medical publishers;
- b. General circulation periodical publishers;
- c. Trade publishers;
- d. University presses;
- e. Societies and Associations, Scientific;
- f. Societies and Associations, Non-scientific;
- g. Small Presses;
- h. Non-paper format publishers;
- i. Government agencies;
- j. Technical publishers;
- k. Quasi-governmental organizations (e.g., United Nations, World Health Organization, etc.)

WT Cox Information Services has access to publications provided by more than 10,000 publishers worldwide. WT Cox Information Services has long-term, well established relationships with our publisher partners. Order and service relationships with publishers include, but are not limited to, categories detailed in items (a) through (k) above.

Periodical/subscription subjects shall include, but not be limited to, materials in the following listing of subject categories:

- a. Health Sciences
- b. Allied Health Sciences
- c. Social and Behavioral Sciences
- d. Science and Technology
- e. Management
- f. Business and Administration
- g. Marketing
- h. General interest.

WT Cox Information Services database includes publications in a wide variety of subject areas including all scientific subject categories, medical journals, technology-oriented trade and information subjects, legal subject matter, business and administration professional publications, management publications and general interest periodicals.

Additionally, WT Cox Information Services supplies titles commonly associated with memberships and/or associations. WT Cox Information Services provides publications available through agencies irrespective of subject matter.

WT Cox Information Services is fully staffed with title information specialists and stands ready to work closely with the Library to manage contracts and any publisher package contracts specific to this collection. WT Cox Information Services will verify package contents each year and will work closely with publishers to ensure that appropriate packages include titles requested and required by the library. Pricing and content is consistently and periodically checked by our Title Information Department and is updated daily based on publisher direction. Additionally our senior staff members are fully versed in the negotiation and preparation of package deals. WT Cox Information Services will secure details directly from library regarding package deals and assist in the procurement and access to required publisher arrangements moving forward in the transition process. Senior sales and academic customer service teams are available to ensure a smooth process.

- e) **Provide evidence of financial stability for at least the last three (3) years of the offeror's operation to include credit rating.**

This information is provided as a separate part of this Response.

- f) **Provide a description (bullet points) of the key individuals who would be assigned to any resulting contract, including contact information and experience.**

CONTRACT STAFF

- **Dana Reeves, Vice President of Sales, Eastern Division.** [REDACTED]

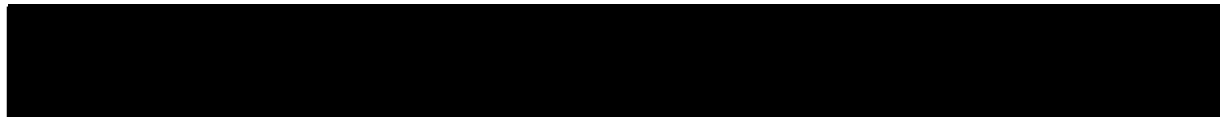
[REDACTED]

- **Mary Brasfield, Customer Service Manager Academic Accounts.** [REDACTED]

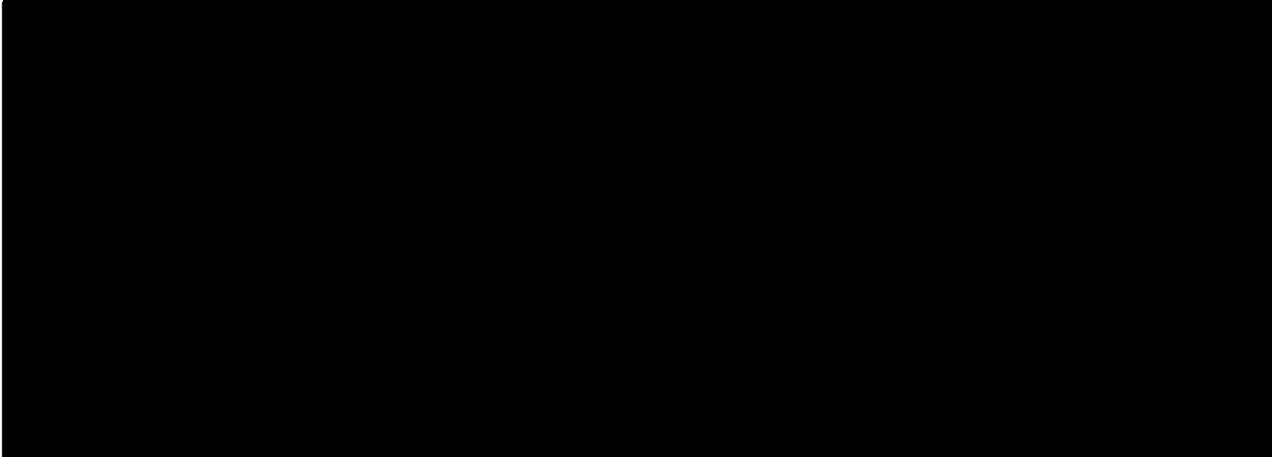
[REDACTED]

- **Deb Knox, Director of Contract Administration.** [REDACTED]

[REDACTED]



- Cynthia Heniford Vidal, Director of Operations - 



- **General Personnel.** WT Cox Information Services is staffed by a team of experienced and knowledgeable senior personnel. Production and delivery of serials subscriptions and services offered under this solicitation response will be satisfied with a full time permanent staff of team oriented support employees in addition to key contact and administrative personnel. Additional clerical personnel are contracted during peak service times. Our team of senior personnel, production team members and customer service representatives are known for going the extra mile.

- g) **Provide a narrative statement (bullet points) describing specific plans for providing the proposed service, including how and when the services will be performed.**

NOTE: This Implementation Schedule may be adjusted based on contract award date, order and invoice needs for timely delivery.

Upon contract award	Transition Conference Call. Documentation sent to library to include Customer Profile, Innovative EDI Information, WT Cox Account Team Contacts, Initial Review of Title Detail
Ten Days	WT Cox to receive documents from library - Customer Profile, Tax Exempt document.
21 days	WT Cox to receive Library Fund Codes/ILS Number lists

30 days	WT Cox office to inform team of clearing date/invoice number
30 days	WT Cox receive title list from library
30 days	Request bar codes from invoice list
30 days	Begin bar coding project
45 days	Library to return title list with final changes
60 days	WT Cox to update their file with any changes
65 days	WT Cox to release title renewals into system
70 days	Final invoice is produced and sent to Library All orders released to publishers for approved start dates.

In addition to the Transition Team, your Director of Sales and senior management will be available for on-site visits on demand but no less than once each year. WT Cox Information Services will provide access to the transition team throughout the entire process before, during and after the order.

WT Cox Information Services assumes all responsibilities associated with transitioning current order through present vendor by contacting publishers and prepayment of orders to guarantee delivery. Your initial order shall be placed as a result of thorough evaluation by sales management, transition team and communication between library staff and WT Cox Information Services production and transition teams.

Our goal is to ensure a smooth transition and continuous service.

Once the transition is complete, WT Cox Information Services will focus on the specialized customer service needs required by University libraries. A brief overview of basic service follows here:

- **Servicing the Subscription.** WT Cox Information Services representatives act as liaison with publishers on behalf of VASCUPP member libraries. As part of basic service, WT Cox Information Services staff and senior management personnel are available to

member libraries for claims, subscription administration and problem resolution for as long as necessary to satisfy contract requirements and financial closure but no less than 90 days after expiration date of subscription. WT Cox Information Services operates from 8:00 a.m. until 5:00 p.m. Monday through Friday, Eastern Standard Time. Customer service representatives may be contacted via email or through Internet claiming capabilities 24 hours a day, 7 days a week. We offer toll-free numbers as a cost saving benefit to University libraries.

- **Order Placement.** WT Cox Information Services places all new and renewal orders within five working days of University notification as part of routine practice unless other arrangements have been negotiated in writing. Ordering systems are automated and orders are placed directly to publishers electronically wherever possible for expedient processing. Batching of orders may occur during each ordering schedule if practical for purposes of consolidating payment, however no special arrangements have been negotiated. All orders are accompanied by pre-payment to guarantee delivery. That is our standard operating practice.
- **Initial Title List.** WT Cox Information Services will provide a listing of titles initially ordered. We will organize and format the list provided for pre-order price quotation into a final annual renewal list prior to placing the initial order. University reserves the right to waive this option. No orders are ever placed without approval unless previously agreed upon. Unless waiver is chosen, subscription list will be formatted exactly like our standard renewal listings and separated by "ship to" address and will include the following information: alphabetical listing of titles ordered or scheduled to be ordered, complete "bill to" and "ship to" address, unique internal identifying number and accompanying VASCUPP ID number, subscription title, ISSN number, quantity ordered, subscription term, status annotation such as new or renewal, most currently known publisher list price, any service charge or discount designated, frequency of publication and any accompanying bibliographical information. Subscription title list shall contain all currently ordered titles and any titles scheduled to be ordered at a later time based on University instruction. Local information fields will contain up to 80 characters for storage of unique identifying information.
- **Confirmation List.** Preliminary renewal lists will be generated and forwarded to member library for review. Our renewal process is quite simple. Customers simply annotate renewal list with changes, such as additions, deletions and quantity changes and return to WT Cox Information Services. Upon receipt, WT Cox Information Services will reformat renewal list incorporating all changes and return to University for final approval.
- **Final List.** WT Cox Information Services will return reformatted list to University for final review and approval. WT Cox Information Services will accept return of final list

as confirmation of accuracy. Reformatted subscription lists will be edited and returned as many times as necessary based on University request. University may waive review of final list at Universities discretion.

- **Subscription Title Lists.** WT Cox Information Services can exchange renewal data through approved library automation systems, e-mail or use of the W.T. Cox web site online service CoxNet which is described in detail under "Electronic Resources". Renewal information will be provided in both paper format, electronic format and spreadsheet format consistent with the requirements of University office software. Formats include but are not limited to ASCII delimited, ISAM, EDI X12 standards and standard commercial software formats. WT Cox Information Services will consult with each University and present renewal information in the format consistent with University need or request.
- **Title List Data.** Renewal lists are separated by "ship to" address and will contain, at a minimum, the following information:
 - ✓ Alphabetical listing of all title holdings, current and future order dates
 - ✓ Complete "bill to" and "ship to" address
 - ✓ Unique account number (both internal to vendor and VASCUPP assigned)
 - ✓ Subscription Title
 - ✓ ISSN (if available from publisher)
 - ✓ Quantity
 - ✓ Term of subscription (i.e., one year, two-year etc.)
 - ✓ Subscription status (i.e., new, renewal, bill later)
 - ✓ Current publisher list price
 - ✓ Discount or Service Charge designated per line item
 - ✓ Frequency of publication
 - ✓ Supplemental bibliographic information
 - ✓ Unique information pertaining to renewal such as internal fund accounting, subject identification, identification numbers etc.
- **Rush Orders.** WT Cox Information Services accepts rush orders by University preferred method of transmission which can include any combination of the following: telephone call, email, fax or CoxNet, our exclusive online order system. Rush orders will be placed within 24 hours with accompanying payment to guarantee delivery.
- **Changes from Customer Order to Vendor Order.** WT Cox Information Services will be responsible for notifying publishers of change of ordering status when renewals are placed through WT Cox Information Services versus directly through publisher or previous vendor. This change will be issued in writing as part of basic order service.
- **Basic Renewal Service in Option Years.** Renewal forms are issued approximately six months before subscription expiration but in no case less than 120 days from expiration

to allow ample time for subscription continuation. Renewal forms will be presented in the format required and detailed previously in this solicitation response. Exceptions will be mutually agreed upon between University and WT Cox Information Services and will be agreed upon in writing. University will annotate renewals with necessary or desired changes and return to WT Cox Information Services in a timely fashion to ensure uninterrupted service. Upon receipt of edited and signed renewal, WT Cox Information Services will place order within five working days. No orders will be placed without authorization of University. Authorization will be indicated by return of signed renewal form. Renewal forms will be transmitted electronically as requested by University and as required by this solicitation.

- **Electronic Ordering System** – WT Cox Information Services provides, as part of your basic service, our exclusive interactive online system *CoxNet*. *CoxNet* is a “real time” system that allows customers to review their most current account information. Database access is available 24 hours a day, 7 days a week.
- **Monthly Status Report**. WT Cox Information Services provides monthly claims status reports as part of basic service.
- **Unavailable Titles**. WT Cox Information Services will notify University about subscription titles that are unavailable for varying reasons. Bibliographic information about each title is contained on both renewals and invoices. WT Cox Information Services, Inc. can also issue a Bulletin of Title Changes customized for each University upon request or on a regularly scheduled basis. Our web-based online customer interface includes a Title Notification tab that addresses changes to University collection as part of basic service.
- **Continuations or “Bill Later” Items**. Initial price quotations will include estimates of costs for “Bill Later” subscription titles. Estimates of these continued subscriptions will be provided on subsequent renewal lists to ensure that budgetary funding is available. Upon request or based on a regularly scheduled report, a listing of titles showing “Bill Later” items will be provided and can include both billed and unbilled items. This listing can also be provided separately.
- **Membership Entitlements**. Memberships that include publications as part of membership entitlement are listed on initial title lists, renewals and invoices and will include information regarding associated publications such as frequency and quantity. Special membership benefits information is included as well. This information is displayed as part of bibliographic information.
- **Payment to Publishers**. WT Cox Information Services does not engage in “special” arrangements with any publisher unless these pre-negotiated special arrangements are made between member library and publisher. In those cases, WT Cox Information Services will honor those prices and submit payment directly to publisher as directed by member library.

- **Advance Payment.** WT Cox Information Services prepays all orders in advance to guarantee delivery. Invoices are issued only after order has been placed. WT Cox Information Services can supply proof of payment to ordering agencies upon request.
- **Adjustments.** In cases where payment adjustments are necessary, such as currency fluctuations or additional costs of subscriptions, WT Cox Information Services will make additional payments to guarantee delivery.
- **Ongoing Subscription Services.** WT Cox Information Services will place orders at any time during the fiscal year or term of the contract. Orders will be placed in accordance with contract requirements, negotiated fees and recognized standard VASCUPP processes. Order confirmation will be issued in same fashion as renewal lists and will contain supplemental information as required or requested.
- **Not Included in the Basic Subscription Price.** WT Cox Information Services will provide all materials published within a given subscription year or term of subscription. All indices, supplementary numbers and added volumes that are included as part of a basic subscription will be supplied to University automatically. Additional items that are not included in the basic subscription price will be made available to the member library/University by special order and provided at publisher's list price plus previously negotiated firm fixed service charge. No additional handling charges shall be incurred with the exception of any shipping or handling charges applied by publisher.
- **No Charge Materials.** Annual or miscellaneous indexes, title pages, table of contents or other materials normally supplied by publisher as part of basic subscription package without charge will be supplied automatically to library member through WT Cox Information Services at no additional charge. No additional handling fees or supplemental charges will be incurred by University.
- **Sample Copies.** WT Cox Information Services will access and provide sample copies when requested by University dependent on publisher restrictions. While publishers generally cooperate with requests for sample issues, not all publishers will provide samples. This is particularly true of journal publishers. When and where possible, WT Cox Information Services will provide sample issues directly from our Replacement Issue Library in these cases.
- **Back Issues.** WT Cox Information Services will acquire back issues of any given title for a period of up to one year prior to initial order or renewal order dependent on publisher allowances. Consumer titles may not be available if supply is exhausted through publisher. In cases such as these, WT Cox Information Services will attempt to provide requested back issues directly from our Replacement Issue Library. Every avenue of acquisition will be exhausted when publisher cannot supply back issue.
- **Catalog.** WT Cox Information Services provides a printed catalog of our most commonly ordered titles each January. Additionally, an online catalog of our entire database of

over 300,000 titles is available via Internet at no charge to customers. The online catalog contains the following information: Title, ISSN, basic cost, frequency of publication, identifying order/title number, cross reference in cases where titles have changed name and supplemental bibliographic information. Database access is available 24 hours a day, 7 days a week.

- **Publishers' Prices.** WT Cox Information Services will provide documentation verifying publisher list price upon request. University will be alerted automatically when price increases exceed benchmarks set by the University. University may designate percentage for notification. Occurrences of significant price increases are rare without significant changes to title presentation, such as merging of two titles or increase in size or frequency.
- **Administrative Services.** WT Cox Information Services provides all services necessary for management of serial collections. These services include, but are not limited to the following:
 1. **Personal Representative.** As part of basic subscription service, each member library is assigned a personal customer service representative. VASCUPP member libraries will be assigned to senior customer service personnel based on the complexity and multiple location needs of this account. Your personal customer service representative is extremely knowledgeable and well-trained in all aspects of servicing subscription accounts of this size and complexity. Your customer service representative is available to you for problem resolution at all levels and will act as a liaison between member libraries and publishers. In addition to your in-house customer service representative, WT Cox Information Services assigns a District Director of Sales to your account. The District Director of Sales will be available to make on-site visits to discuss services and future planning, to assist in a smooth transition to our service and to conduct training as necessary. Representatives are available to you via toll-free phone lines, fax and email. Customer service representatives will respond to inquiries within one working day.
 2. **Claims for Missing, Defective and Mutilated Issues.** WT Cox Information Services representatives act as your one-point-of-contact liaison with publishers on behalf of member libraries. Your personal customer service representative will obtain replacement issues for subscriptions that are defective, lost in transit, missing, mutilated or otherwise unacceptable. Loss report must occur within 60 days. Often publishers offer longer claim periods and claims will be accepted based on publisher restrictions as well. WT Cox Information Services will continue to service subscriptions for a minimum of three months beyond expiration of subscription.

3. **Electronic Claims.** WT Cox Information Services offers *CoxNet*, our exclusive online claiming service. WT Cox Information Services encourages the use of *CoxNet* for claiming purposes as instant notification is provided to customer service representative through this service. Member libraries may indicate preferred method of claiming and may use any combination of available methods. Claims may be submitted in a variety of methods and include toll-free phone, fax and email.
4. **Timeframe.** WT Cox Information Services places claims to publisher within five working days. Claims are accepted electronically, by print, phone, fax and email. Rush claims will be processed in fewer than five days. Review of rush claim processing is available via *CoxNet*.
5. **Claim Information.** WT Cox Information Services provides, at a minimum, the following information to publishers as part of claim process: Ship to address, claimed title, specific issues, date of title order, term of subscription, amount paid, proof of payment (check information) and pertinent information of claim, such as missing issue, change of address, name change etc.
6. **Claim List.** As part of basic service, WT Cox Information Services provides a summary of claims to each member library on a regular schedule as dictated by member library but at a minimum of monthly. Claims reports are available in real time via *CoxNet*.
7. **Cancellations and Refunds.** WT Cox Information Services will notify publisher of cancellation within five working days. Monies refunded from publisher will be credited to member library account immediately upon receipt. Refunds can be issued as credit to account or paid directly by check to library. If no refund is forthcoming, customer service representative will notify member library.
8. **For Lost Periodicals, Replacements, and Discontinuance of Publication.** All monies refunded by publishers will be refunded in full to member libraries in cases where no replacement options are offered.
9. **Due to Cancellation.** WT Cox Information Services will provide written evidence of attempts to secure refunds from publishers on behalf of member libraries when titles have been cancelled upon request.

10. Duplicate Issues. Customer service representatives act as a liaison between member libraries and publishers. WT Cox Information Services will work directly with publisher to resolve duplicate copy issues if/as they occur.

11. Addresses.
 - a. Bill to and Ship to Addresses. WT Cox Information Services systems are open architecturally and support multiple shipping addresses and departmental indications under one billing address. Multiple shipping addresses under each billing address may be either domestic, foreign or both. Each address is allocated five lines and in excess of 30 characters per line.
 - b. Change of Address. WT Cox Information Services will be responsible for notifying publishers when changes of address occur.

- h) **Provide a narrative statement (bullet points) or statistical reports describing internal quality control procedures.**
 - Quality Assurance. WT Cox Information Services prides itself on the level of service provided to all libraries in our family of clients. We provide service that exceeds expectations. Every single employee is committed to customer service and empowered to act on library's behalf.
 - Well established and long term processes and procedures are firmly placed and followed by all team members in order to maintain quality control, scheduling of timely deliveries, tracking charges and satisfaction of reporting requirements. At all stages of order processing, invoicing, renewals and customer service, we conduct strict quality assurance measures such as employing a positive pay system for all checks issued prepaying publishers to guarantee delivery. Order submission to publishers is accomplished utilizing state of the art methods and delivered electronically wherever possible to ensure timely delivery of subscriptions. We assist customers with day to day management needs by providing customized reports and variable methods of accessing order records.
 - Routine quality control reports are generated and analyzed by our management team, at a minimum of weekly. Any problems are quickly discovered and corrected. Quality is measured by order accuracy and claim levels as well as degree of problems in our customer service department. Due to the flexibility of our organization, we are able to quickly adjust procedures as necessary when a problem is identified. Our executive management team is consistently informed of any anomalies or deviations

from normal operating procedures, whether it is due to systems or process. Our IT department is constantly monitoring our hardware and software for discrepancies or shortcomings.

- Customer service processes and procedures, which are an integral part of our service package, are firmly in place. The number of claims per representative is evaluated twice yearly to ensure workload balance and excellence in service to customers. All clerical staff is accountable to their senior customer service team leaders and each team leader is accountable to both the Executive Officers and the VP of Operations.
- At all levels of service, we measure the following management metrics for monthly evaluation:
 1. Alignment with our philosophy of service first
 2. Quality of Product
 3. Timeliness of delivery
 4. Cost reduction
 5. Cycle time reduction
 6. Meeting commitments
 7. Customer satisfaction
- During these ongoing evaluations, we involve the people who are responsible for the work to be measured because they are the most knowledgeable about their own work. Management has ongoing discussions to:
 1. Identify critical work process and customer requirements
 2. Identify critical results desired and align them with customer requirements
 3. Evaluate measurements for the critical work processes and critical results
 4. Re-establish performance goals, standards and benchmarks based on our findings.
- Based on customer feedback, we are able to define broad, general areas of review and repair, specific areas of accomplishment that will satisfy major divisions of responsibility within each function and finally drive improvements made under each criteria.

- The quality of our performance is measured using the following five points of review:
 1. Specific. Clear and focused to avoid misinterpretation
 2. Measurable. Consistently quantified and compared to previous data.
 3. Attainable. Achievable, reasonable and credible
 4. Realistic. Fits into both our organization and your organization's constraints and is also cost- effective; and
 5. Timely. Can be accomplished in the agreed upon time constraint.

- We communicate desirable changes and enhancements to service by communicating and then demonstrating that they have been accomplished.
 - i) **Describe in detail your step-by-step plan for converting subscriptions currently serviced by other vendors.**

The following overview will give you a basic idea of our transition steps at implementation. Your transition team will consult with the University team directly to solidify processes required and to work in collaboration to assist in an orderly transition process. Your transition team includes Dana Reeves, the Vice President of Sales, Matt Cox, your Regional Director of Sales, Mary Brasfield, your academic customer service manager and team leader and Deb Knox, your Contract Administrator, Eric Harris, our IT manager, and Cynthia Vidal who handles all EDI and invoice considerations as well as support staff in orders, fulfillment and accounting.

Our transition team will begin to work with your collection immediately upon contract award. WT Cox Information Services offers an unheard of level of service and flexibility to assist in transition of service. Our transition team is managed by an experienced professional. Our transition team can work both on and off site to ensure a smooth changeover to WT Cox Information Services. Your library will be assigned to a senior Customer Service Team Leader who is fully supported by a robust and well trained clerical staff with knowledge and experience in all aspects of collection management. Our Team Leaders understand the daily procedures and concerns of library clients and can communicate with them as colleagues. Your team understands how the library functions and understands the political aspects that affect the library's working environment, including funding, staffing, and collection development and how those issues affect their approach to serials and e-resources. Our transition team will assess the library's current situation and provide support and assistance as needed with WT Cox' services and products. The Transition Coordinator and associated team members work closely with the library in the transition of their account, gathering client data and ensuring the account structure is appropriate for their needs. Our Transition Team will also provide

assistance with electronic claiming and invoicing. Our entire Transition Team views their roles with WT Cox Information Services as advisors and consultants for the library working for the mutual benefit of the library client and the vendor.

WT Cox Information Services provides conversion services as detailed below:

Immediately upon contract award, the discovery process will begin to ensure that titles required are included. Communication will be ongoing between production personnel and transition team personnel to ensure accuracy.

During transition, expire dates will become part of discovery process. A transition renewal list will be developed for review.

Provided below is our step by step transition procedure for your review. Steps may be expanded or discarded based on your specific needs and requirements. Transition processes can begin upon contract award and may progress at a pace set by your library administrators and staff. Transition tasks are based on your main periodical start dates with the expected completion as soon as possible and prior to your required start dates. Publisher requirements dictate that orders are placed in adequate time to guarantee continuous service.

ACCOUNT TRANSITION PROCEDURE

➤ Account Set-Up

- Production/Sales Coordinator notifies the Manager of Customer Service of a new client, Organization Name and Customer Name.
- Sales Coordinator assigns an Organization number and Customer number and files appropriation information in system.
- Manager of Customer Service sends the new customer a welcome packet including the name and contact data of the assigned Customer Service Representative.
- Customer Service Representative sets up a CoxNet account.
- Within two days of sending the welcome packet, the Customer Service Representative sends a personal welcome letter containing CoxNet account access information and notification that the customer will be contacted in a few days to clarify account set up details.
- Once commitment is signed, Customer Service takes over new customer to complete the transition.
- Team Leader sends Customer Profile to client.

- Customer service team leader schedules and conducts site visit, if warranted, to determine account structure for major account.
- Client completes profile sheet and returns.
- Sales Coordinator enters profile data into internal system.
- For major accounts, the Manager of Customer Service will schedule an account review meeting/teleconference to be held within 10 days of the account being accepted
- Account review meeting will include (but not be limited to) the Manager of Customer Service, assigned Customer Service Representative, and if warranted or desired, account Sales Representative.
- Customer Service facilitates revisions to the title list, including packages.
- **Order Process**
 - Customer Service sends title list to Production department for orders.
 - Customer Service submits order/invoice instructions to client file. (Based on EDI needs.)
 - Client submits ILS numbers and/or fund codes and Customer Service submits to Orders.
 - Client submits E-package title list.
 - Customer Service sends E-Package title list to Titles to obtain/confirm publisher pricing.
 - Titles send confirmed E-Package title list/pricing to be ordered.
 - Order is finalized and keyed into system.
 - Customer service team leader and/or Sales Representative is notified by Production that the order is finished.
 - Order Summary is sent to client for approval.
 - Client approves final order and the order is released.
- **EDI Invoicing (if desirable)**
 - Customer service team leader and/or IT staff completes EDI Setup Form for invoicing.
 - IT sends client EDI data to Customer Service Team Leader.
 - Client receives EDI data (username/password) to client.
 - Libraries may choose to download EDI invoices from CoxNet instead of using FTP. They must still be set up by IT as an EDI client.
 - Conduct invoice test on small sample invoice prior to main invoice issue.
 - Set up as live EDI invoicing account.

➤ **Invoice for Completed Order**

- Invoice client for completed order. WT Cox Information Services acknowledges that your invoice process may require special handling. Details will be determined during transition process

➤ **EDI Claiming (if desirable)**

- Plan bar code project as necessary and submits bar code production request form.
- Schedule and conduct bar code project.
- Customer Service Team Leader completes EDI Setup Form for claiming and sends it to IT.
- IT sends client EDI data to Team Leader.
- Customer service team leader sends EDI data (username/password) to client
 - Ill clients may choose to send claims via email instead of FTP. They must still be set up by IT as an EDI client.
- Conduct a claiming test.
- Notify client of successful test and set up as live EDI claiming account.

2. **Electronic Resources**

- a) **Describe any electronic resource management modules offered to assist with the acquisition and management of electronic journals, electronic journal packages, and online databases.**

COXNET....OUR SERIALS MANAGEMENT SYSTEM

WT Cox Information Services provides, as part of your basic service, our exclusive interactive web-based system. CoxNet is a "real time" system that allows customers to review their most current account information. Database access is available 24 hours a day, 7 days a week.

Our system gives all customers the ability to administer and manage their account via the Internet. This innovative program allows customers to order (with administrative approval capabilities), file claims, review and alter renewals and retrieve various details of their accounts.

This "real time" system allows the user to see up to the minute information on orders, renewals, invoices, titles, claims, changes and a variety of reports. Systems are updated continuously in real time.

All modules of CoxNet are interactive and web based. The online system includes the following modules:

Subscription Module that includes A-Z title listing, media type and package information, order, bibliographic and account details, publisher policies, claim/change/edit link on main screen, keyword search, title and title access links.

Claim Details Module includes claim details, message forum and resolve/resubmit functions.

Orders Module includes details on order groups, capability to download order list into CSV or excel format, order, bibliographic and account details

Renewals Module allows online renewal function, 24/7 access and downloadable list to PDF or excel. Includes a feature that calculates costs as you move through renewal process to assist with budgetary concerns

Reports Module includes one stop location for reports, multi-file options, customized reports are also available. 24/7 access

Title Module includes online access to catalog, search by feature, media types, language search, bibliographic information and is available in real time. Online catalog includes all titles available.

Title Notification includes up to date key title changes which relate specifically to your order including price increase notifications set to your specific percentage ceiling.

Online Subscriptions includes titles with an online component in your collection. Individual title detail pages allow you to track the progress for license, registration, activation and confirmation of access. Note fields are available as you track progress.

Check In Module includes capability to check in subscriptions, add titles that are not ordered through WT Cox Information Services and also acts as another claim portal.

Our featured enhancements to our proprietary system include:

Notifications has been designed to keep you up to date with key title changes which relate specifically to your orders. This feature has been designed to allow you to view all changes or specify the start date range for the orders you wish to review.

The results will be viewable as a web page rather than a series of reports that will be out of date as soon as they are produced.

Types of changes that will be reported are:

- Delays
- Frequency
- ISSN

- Issues
- Media Type
- Name
- New Title
- Publication Resumed
- Publisher

You will be able to view the previous value and the new value of any change as well as the effective date/volume that this change took place.

You will be able to search for any of the types of changes above or return all changes and then use the sort arrow on the search results page to sequence a particular column.

All results can be exported to excel. No need to store multiple reports of notifications or emails advising of individual changes. In summary, it is your view of your changes when you want it

A customer filter enhancement enables multi-customer organizations to more easily management subscription activity by specific locations within the organization.

RSS Feeds For Notifications

A new feature added to CoxNet allows a user to receive their Notifications via an RSS Feed. The Notifications will still be sent to CoxNet even if you select the RSS feed option. Selecting the link will allow you to specify the method you wish to subscribe to this feed. (This will vary with your browser of choice). Most browsers do allow you to send the feed to your email account/client.

Online Subscriptions allows you to view any title that has an online component. This will show all online titles and by selecting an individual title, a detail page will be displayed to allow you to track the progress for registration and activation of that title.

There are three steps that you can record your progress in setting up access:

1. License
2. Registration
3. Confirmation of Access

Notes can be entered for each of these steps. An excel option is available to export the summary of the status for each title.

Additional enhancements include:

- Customized view of subscriptions
- Direct access to Library of Congress records
- Ability to search by Dewey Decimal Classification (DDC)
- Ability to search by LC subject classification codes
- Ability to search/filter subscriptions by Invoice Number in Subscriptions Tab
- Simplified License Detail View
- Volume/Issue information available in subscription detail screen

Each of these enhancements has been added as a part of continuing development based on customer feedback. Enhancements are ongoing at all times.

CoxNet also provides a user management module or “administrator” console to control user access. In general, an organizational account will be set up with administrative capabilities. All subaccounts will be viewable via one “Master” account and also viewable as individual subaccounts. Subaccounts and any special packages necessary are assigned a unique identifying number and may be further identified by ship to addresses, billing addresses, funding codes and a variety of other parameters. Subaccounts will be identified to your specifications. Administrative capabilities can be provided or restricted as dictated by your library’s approval processes. Librarians can be given the capability to renew, order and claim (or any combination) or can be restricted from doing so. All orders from the Library will fall under the administrative account. One master administrator should be identified. Subaccounts can be separated by ship-to, HEGIS, cost codes or internal reference codes. Reports can be generated by any common denominator.

Database records available include title, publisher, ISSN, available formats and also includes a separate title information database which is searchable in a variety of formats. Within the title database, memberships, membership titles and packages are clearly identified. The internal title information within your collection can be customized with publisher ID numbers, account numbers, invoicing information and any number of information the Library deems necessary.

Online titles include registration and access information. Additionally, a customized online access report is available to Library as part of basic service.

CoxNet records are updated daily in real time. Enhancements to the system are incorporated automatically as they occur.

ELECTRONIC JOURNAL ASSISTANCE

WT Cox Information Services will assist in electronic journal access management as follows:

- (a.) Assist library by working closely with Library personnel and publishers to gain approval for electronic access, ensure that pre-payment is made for access and further, follow up to ensure that links are provided to Library
- (b.) Provide real time and customized reports to identify changes in electronic journal packages. WT Cox Information Services will act as a liaison between publishers, servers and the library to make a smooth transition for electronic access and to assist the library to achieve continuous access.
- (c.) Identify and verify range of access for electronic publications and provide information to library
- (d.) Order access in a timely fashion to ensure sustained and continuous access
- (e.) Identify on an ongoing basis, any titles that become available as electronic only options and notify library to begin transition to electronic only access.

Online access instructions are provided directly to you by the publisher at the email addressed specified as part of order placement. Representatives stand ready to assist as necessary.

Additionally, a report can be generated that details the online access instructions for your collection including complimentary access provided with print journals. Customer service representatives are on hand to assist with actual access issues

- b) Describe the process by which access is activated for online journals hosted on third party platforms (e.g. Ingenta, Atypion, Highwire, etc.)**

The majority of publishers and vendors require the library administrator to activate the online journal access. We are set up to activate subscriptions hosted on Ingenta on behalf of our customers. The library's Ingenta administrator will just need to select WT Cox as their agent for activation. Our customer service representatives will activate any new subscriptions on Ingenta on the customer's behalf via our agent access portal.

- c) **Describe the notification process if additional registration or license execution were required in order to activate title access.**

WT Cox provides online registration and licensing details for ordered titles in CoxNet. The IP addresses and administrator email address are provided with any electronic orders. In most cases if additional information is required to activate online access, the publisher will email the customer directly. In the instances that the publisher contacts WT Cox, the customer service representative emails the customer and posts a claim message in CoxNet.

- d) **Describe any statistics you can provide for electronic resource access, printing, or downloading.**

WT Cox Information Services will be able to provide COUNTER 4 JR1, JR1a, JR2, JR3, DB1, DB2, DB3, PR1, BR1 and BR2 statistics through a statistics harvesting and consolidation platform available as a separate product offering. Pricing varies based on number of platforms requested.

- e) **Describe your system or resource for the collection and consolidation of journal and database usage statistics:**

The product website provides COUNTER 5 reports for the last 5 years in a consolidated report format. Flexible analysis reports by standard number, platform and by customized date and timeframe; charts and graphs; and raw data will also be accessible on the website. Exports of data for csv, xls, and zip formats are available. A manual upload option is also available for non-compliant COUNTER data and statistics will be shown in a separate column in the consolidated reports.

- i. **Describe how the system presents the data in a standardized and user-friendly format with a single point of access.**

See the complete system described in detail under 2a above. We encourage you to request a demonstration during the evaluation process by contacting Dana Reeves at dreeves@wtcox.com

- ii. **Describe and provide any conditions necessary for the library to access this system.**

The system is provided at no charge to all customers. It is a web-based desktop system that requires no additional hardware or software. Our system can be accessed using standard office

equipment and software. The system is accessed via a secure website with username and password authentication.

iii. Describe how the system compiles and links statistics with payment data.

The WT Cox staff will upload payment data from CoxNet into the system and automated cost per use/view statistics will be available for viewing on the platform. An option to view cost per use/view statistics in CoxNet based on statistics harvested from the system will also be offered through an integrated service at no additional cost.

iv. Describe how the system integrates vendors and payments that are not processed through the vendor.

Titles ordered directly and paid directly by University will display in system and in documents as "paid thru." This allows the title to appear in your collection but indicates no money was sent to the publisher from WT Cox. The title will continue to roll over year to year until such time as you it or ask us to order it for you. Additionally, WT Cox staff will be available to upload any additional payment information not available in CoxNet into the system if the library provides the payment data. The library will also have the option to upload their own cost data for payments not processed through WT Cox Information Services.

f) Describe the process that is used to claim online journals and online journal access issues.

Within CoxNet, there is a category in the claim module for online access. In the comment box University describes what message is being received when you try to log on to the publishers' site and cannot. When these come through on our side they are red flagged as Urgent. These claims take precedence over all other claims. If your customer service team leader is not immediately available, the administrative assistant is notified and the resolution is put into motion.

Online access issues are given top priority and are considered emergency issues. Customer service personnel will place a phone call directly to publisher service center and take immediate action to regain access for online journals.

WT Cox Information Services has a "rush" procedure in place for online access issues. Online access issues are resolved on the same day whenever possible and based on publisher responsiveness. Electronic access issues are given a high priority. Swift and decisive action is

taken. Our customer service representatives and their clerical support teams have authority to take definitive action with publishers on your behalf.

- g) **Provide a timeline describing the intervals between the time of receiving an online access problem report to when it is reported to the provider to when it is resolved.**

Immediately upon notification of access issues, the customer service team leader will assign a member of the clerical team to gather all details such as error message, email address and IP so that publisher can be contacted by phone to determine cause of access loss and then report back to end user with findings and anticipated resolution of problem. Resolution is generally achieved in a matter of hours based on publisher response.

- h) **Describe the initial and follow-up processes used to resolve the problem.**

These claims are always called directly into the publisher. The first thing we do is verify your IP address. We discuss in detail what you have reported. If it is not clear from your comments, we will phone you and gather more details. If the publisher feels they have a better and quicker resolution by speaking directly to you, we supply your contact information. We will stay in touch with you until you relay to us that the problem is "fixed." From time to time they will request a screen shot of the message you are getting. Because your IP addresses are provided with every order when it is submitted to the publisher, this is not a common claim problem for us.

Customer service personnel report back to customer with findings. Access issues are resolved within 24 hours or less based on publisher problems and responsiveness.

- i) **Describe any 24-hour reporting and response ticketing system.**

When you file a claim, it is in real time and is addressed immediately or by next business morning based on the time of day (after hours) the claim was placed. Customer notes are placed in the claim with action taken. As previously mentioned these "tickets" come in as Urgent and are red flagged to us. Every effort is made to get immediate resolution and we ask that you sign off on the claim as resolved from your side once the problem is resolved. For any IT problems, those are treated as Urgent and red flagged to our IT Director. Any fixes are addressed immediately and resolved within 24 hours generally. Our organization is flexible and nimble and reacts quickly to problems.

- j) **Describe how Open Access titles are identified and how the University will be notified of their existence.**

WT Cox does not distinguish between gratis and libre open access. Both are listed as free online in the registration instructions with additional detail of free online access coverage in the coverage statement provided in CoxNet. Embargoed open access will only be indicated as part of the coverage statement along with subscription coverage information. Hybrid open access journals are not designated in CoxNet. Additional details of Creative Commons Attribution license type for the open access journals are provided in the licensing information when available from the publisher/vendor.

- k) **Describe how online-only subscriptions that have delayed publications are handled.**

The title status is noted delayed with publisher details. University will also receive a notification on the change of status. Notifications can be sent directly to your email with an RSS feed detailed in our online system description.

- l) **Describe how billing would be handled throughout that delay.**

We change expiration date in the order so that you do not continue to pay for the title until the publication date becomes current. If you have any existing order in this status, we will suspend payment of additional funds sent to the publisher with internal system flag.

3. **Pricing and Payments:**

- a) **Describe any special rates or pricing you would offer in a multi-year, multi-institution consortial contract.**

WT Cox Information Services shall honor pricing received by institution from publisher or arranged through a consortia agreement in place with no additional fees except service charge offered. WT Cox Information Services offers a 1.75% service charge in Year One to VASCUPP. As recognition of the multi-year, multi-institution consortium environment, we will offer an additional .25% savings bringing the offer to 1.5% service charge in Years Two to Five and beyond. All pricing is based on current publisher price or consortia agreements in place.

- b) **Describe any title fee discount or waiver you would offer in a multi-year, multi-institution consortial contract.**

WT Cox Information Services will reduce all net title fees for a multi-year, multi-institution consortial contract. Typically this saves the contract \$5.00 to \$7.00 per applicable title.

- c) **Describe any other price-related inducements you would offer in a multi-year, multi-institution consortial contract.**

The service charge shall remain firm for the life of the contract. As detailed above, WT Cox Information Services will offer an additional .25% savings for option years 2 through 5 and beyond.

- d) **Describe any terms and/or discounts applicable for one-line invoice payments, prepayments, deposit accounts, and other payment options in a multi-year, multi-institution consortial contract.**

WT Cox Information Services offers a prepayment discount detailed below as well as additional savings in option years. Additionally, our offer is guaranteed to remain firm for the life of the contract. All orders are prepaid to guarantee delivery.

- e) **Provide pricing for all continuations as listed in Attachment C.**

The pricing is provided as a separate attachment to this Response.

- f) **Provide a brief narrative outlining how the University's prepayment and/or current subscription payments are insured or otherwise protected.**

WT Cox Information Services is privately held by one family and has been under the same ownership offering collection management services since inception. WT Cox Information Services has never defaulted on a contract nor been denied a bond due to irresponsibility of business practices or failure to perform satisfactorily. We have never filed for bankruptcy nor been in default of a loan. There has not been any past nor is there pending litigation claims filed against the company. We are not in merger or acquisition talks. We have no outside investment firms and are completely based in the United States.

WT Cox Information Services continues to position itself as a viable partner for academic institutions through carefully controlled growth practices, sound financial principles and employment of library industry professionals committed to successful relationships with our library and publisher partners.

WT Cox Information Services shall at all times segregate the University's prepayments from the other clients and operating cash. University payments shall be held in a separate account designated for this purpose. WT Cox prepays all orders to guarantee delivery.

WT Cox Information Services will provide the Library the option to either roll over any credit resulting from an early annual payment to a subsequent year, or to close out the account with credit or a refund.

WT Cox Information Services does provide a prepayment program which is described in detail below.

Early Payment Program

Our prepayment discount is as follows:

Before May 31 st	1.25% discount
Before June 30 th	1.0% discount
Before July 31 st	.8% discount
Before August 31 st	.6% discount
Before September 30 th	.4% discount
Before October 31 st	.25% discount

Prepayment or payment by check or wire transfer is required to take advantage of prepayment discount and is the preferred method of payment for this account.

g) **Provide a schedule of the payment, invoicing, and renewal cycle.**

Renewals are issued approximately six months in advance of renewal cycle for University review. University personnel simply annotate document with any changes and return to WT Cox for ordering purposes. Renewals may also be created via CoxNet, our web-based customer management system.

On order approval, orders are released to publishers with prepayment to guarantee delivery.

Once orders are released with payment which occurs on a weekly basis, an invoice is created and released to our web-based online interface as well as printed if desirable or uploaded to EDI system for review. If no prepayment is made, payment on invoice is appreciated within 30 days.

- h) **Describe your EDI interface and furnish a list of ILSs successfully using your EDI records.**

ILS INTERFACE

WT Cox Information Services keeps current with the ILS vendor specifications and supports all versions of EDI software. WT Cox Information Services offers migration assistance during the transition phase of start-up. Details of all services are provided in the transition section of this response.

We support EDI for the following vendors and systems. Interface is offered at no charge.

Symphony – SirsiDynix – all SirsiDynix products, but the most common is Symphony. Others include Horizon, Unicorn, Classic Dynix)

Aleph – Ex Libris

Voyager – Ex Libris

Millennium – III

A basic overview of EDI service is detailed below. This is an example only of how EDI functionality works through WT Cox Information Services. During transition, specific testing will be performed to verify connectivity.

EDI Functions Client Overview

Electronic Claiming. Electronic claiming allows you to generate claims through your ILS and then send them via FTP to WT Cox, who then transmits the claims to the publishers. This method reduces staff time spent entering individual claims and provides the required claim information for the publisher.

- The electronic claiming match point is the WT Cox Persistent ID (displayed as Our Ref Number) and must be present in the **Vendor Reference Number** field of the Order record in the **Type tab**, right below the field which should say **Agent's Subscription Identifier (SNA)**. The Persistent IDs may be scanned into the records using bar codes or keyed manually.

- The library needs to make sure their WT Cox vendor code is setup properly in the order records. We will contact ILS for specific information.
- After the Persistent IDs have been entered into your ILS, WT Cox will send you the FTP address and ID numbers. The client will need to send WT Cox a test file of 3-5 claims. As test claims, they will not be sent to the publisher. WT Cox will notify you when the test has been completed successfully and you may begin claiming on a regular basis.
- WT Cox offers the option to have an automatic confirmation sent when they receive electronic claims. To receive confirmations, the client must provide WT Cox with the appropriate email address. We recommend you use a departmental email address rather than a personal email address.

Electronic Invoicing. Invoice information is available in electronic format to load directly into the client's ILS. This process posts payments and other invoice data to each record, eliminating time-consuming manual input. Each time an EDI invoice file becomes available, an e-mail notification is sent to the client. EDI invoices are available for download from CoxNet or may be retrieved by FTP.

The client may limit the invoice by a specific number of line items. You may want to consider a maximum of 100-500 line items per invoice.

- The match point for electronic invoicing is the **Order Record PO Number**. The PO Number must be static and unique for each title and must be entered into the ILS field of the WT Cox system. The client must supply WT Cox with an Excel file of their subscriptions, including Title, ISSN, and Order Record PO Numbers.
- If the client desires to use fund codes, they can supply them in the same Excel file as the Order Record numbers for entry into the WT Cox system.

i) **Provide sample invoices and other relevant fiscal documents**

Sample invoices and other relevant fiscal documents are provided as part of Sample Reports attachment.

4. **Reports:**

WT Cox Information Services supplies as regular reports the following: Active Orders; Active Orders by Language; Irregular Titles; Online Electronic Journals; Standing Orders; Active

Claims; Resolved Claims; Claiming Restrictions; Master List of Title Changes; Customer Specific List of Title Changes; Price Change Report; User Management and Permissions. All title information personnel, customer service personnel and IT personnel are involved in ensuring that data fields populate completely and accurately. System checks occur regularly and on demand if deficiencies are reported.

Customized reports are as variable as staff requesting them but are generally specific historical price analysis; invoice and payment reporting; code reports, i.e., funding as it relates to titles purchased; statement of accounts; membership titles; title recaps by location or fund code. There is no limitation on the type of report that can be provided including all reports detailed above. Please allow up to 7 working days for customized reports. Rush reports are available. Our reporting system is continually enhanced and many of these "custom" reports shall become regular reports available based on your specific data points.

Some examples include:

Financial Summary Report. Report detailing all credit or debit invoices designated by ship-to address and fiscal year. This report shall contain, at a minimum, the invoice number, dollar amount of invoice, dollar amount of credit or debit invoices, subscriber identification including account number and service charge levied.

Claims List. Report summarizing claims activities each month. Report includes claims filed, outstanding claim and resolution as indicated by publisher and shall be cumulative, by title, for all claims retaining unresolved. This report is also available for download on demand from CoxNet, our web-based customer interface.

Subscription Status Information. Report detailing any title irregularities or changes to title for each library. Estimated price increases or actual price increases will be provided as part of this monthly status report which is available monthly or on demand.

Consolidated Reports. WT Cox Information Services acknowledges that library administration may consider the monitoring of deliverables. As part of basic service in this endeavor, WT Cox Information Services can and will supply the following cumulative reports on request:

Consolidated Monthly Claims Reports. Report detailing claims filed categorized by ship-to address, sorted by title that provides claim history

Historical Price Analysis. A five-year report that details past pricing trends based on your collection. This report shall be provided by subscriber and alphabetically by title or by subject identification as Library requests.

Forecast of Pricing. A report detailing economic factors affecting coming year prices, i.e., publisher price increases. This report can also include industry standard forecasts.

Ship-to List: Report detailing all subscriber agencies and addresses.

Courtesy Invoice Data: Separate itemized invoices for each subscriber, arranged alphabetically by title. An unlimited number of paper invoices shall be supplied. Electronic and paper invoices shall be supplied one month after renewals and/or after new order placement.

Missing Issues. Titles most commonly stored in our Replacement Issue Library.

Additional customized management reports are available on demand and at no charge to Library as part of basic service. Reports can be provided based on your specific data points.

Requested information can be sorted, subtotaled and re-totaled by all or any combination of fields indicated by library. Our system is open architecturally and can accommodate requests of multiple information fields delivered in presentation of choice with your specific data points. Management reports format. Reports will be made available in spreadsheets or software programs commonly available as part of standard office operations. WT Cox Information Services will provide access to data and programs are delivered on request as part of basic service at no charge.

WT Cox Information Services will supply reports in electronic formats including PDF, ASCII comma delimited format or MS Excel. Printed reports are also available for delivery. Library may request reports in any necessary for report production.

- a) **Provide samples of all standard reports available as outlined in Section VI, H**

Sample reports are provided as separate attachment.

- b) **Indicate any applicable policies, such as price or advance time, required for preparation of customized or nonstandard reports.**

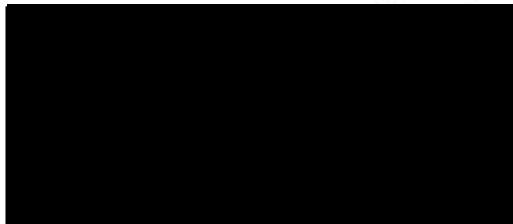
Many of the reports are available via our web-based customer interface detailed elsewhere in this Response. For custom reports, please allow 7 to 10 business days. Rush service is available as necessary.

5. **Provide four (4) recent references, either educational or governmental, for whom you have provided the type of services described herein. Include the date(s) the services were furnished, the client name, address and the name and phone number of the individual the VASCUPP Serials RFP Committee has your permission to contact.**

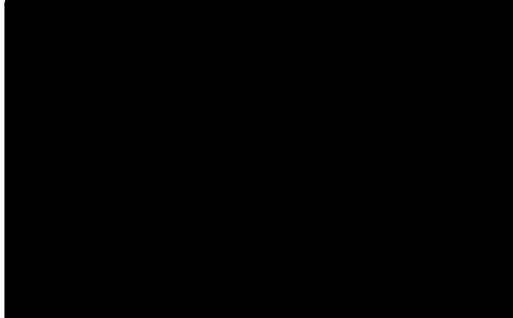
Rice University /Fondren Library MS 230



Southern CT State University/ Buley Library SCSU



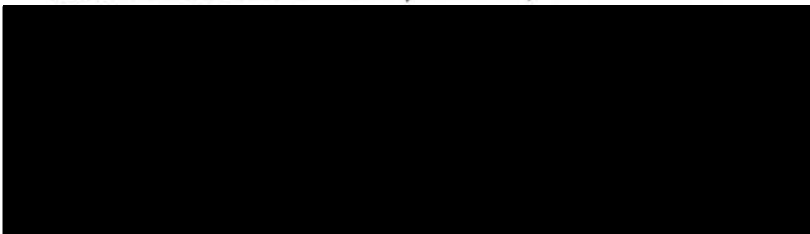
University of Texas at Arlington Libraries



Texas Woman's University Libraries/ Ex Libris Alma



North Dakota State University Libraries/ Ex Libris Alma



All references are verified as to their willingness to be contacted by prospective customers. We appreciate their willingness to do so and treat all customers with the same level of respect.

6. Participation of Small, Women-owned and Minority-owned Business (SWaM) Business:

If your business can not be classified as SWaM, describe your plan for utilizing SWaM subcontractors if awarded a contract. Describe your ability to provide reporting on SWaM subcontracting spend when requested. If your firm or any business that you plan to subcontract with can be classified as SWaM, but has not been certified by the Virginia Department of Small Business and Supplier Diversity (SBSD), it is expected that the certification process will be initiated no later than the time of the award. If your firm is currently certified, you agree to maintain your certification for the life of the contract. For assistance with SWaM certification, visit the SBSB website at <http://www.dmbv.virginia.gov/>.

WT Cox Information Services is currently certified as a SWaM vendor with Certificate Number [REDACTED]. We are also registered in the eVA system. We agree to maintain our SWaM certification for the life of this contract.

ADDITIONAL INFORMATION

CUSTOMER SERVICE INFORMATION

Our management philosophy is company-wide. Every team member involved in your service is committed to excellence.

Your WT Cox Information Services representative will act as your one point of contact liaison with publishers on behalf of your library. Your representative will provide accurate and timely responses to you. Customer service representatives work directly with publisher to resolve start up, claim and problems as they occur. A Senior Customer Service Team Leader shall be assigned to your account. Each Customer Service Team Leader is supported by a clerical staff working in the background.

Customer service representatives communicate with the publisher in a variety of ways. Primarily, claims are filed electronically as they are received. Online access issues and newspaper delivery issues are responded to immediately and by phone. Routine claims that cannot be accepted electronically based on publisher restrictions are transmitted daily by mail.

WT Cox Information Services works closely with personnel to form solid working relationships to ensure a successful partnership. Consistent communication is the key to the most efficient management of library collections. We work as a team with library staff. Free and open communication and information needed willingly provided in a timely fashion will enhance our most effective relationship.

Online access issues are given top priority and are considered emergency issues. Customer service personnel will place a phone call to publisher service center and take immediate action to regain access for online journals.

In the event that electronic access is ever interrupted, WT Cox Information Services will work closely with publisher to determine compensation for loss of electronic access. In general, either a credit will be issued or terms of access will be extended. Our goal is meet the needs and specifications of the Library for remedies and solutions. Publishers notify our title information department so records can be updated. Records are available in CoxNet in real time.

WT Cox Information Services has a "rush" procedure in place for online access issues. Online access issues are resolved on the same day whenever possible and based on publisher responsiveness. Electronic access issues are given a high priority. Swift and decisive action is taken. Our customer service representatives and their clerical support teams have authority to take definitive action with publishers on your behalf.

Claims are issued daily and are set up in three cycles at eight week intervals. Escalation procedures are put in place if no resolution has occurred.

Full claim and problem resolution service shall be provided to "ship-to" addresses. Claims to publishers include, at a minimum, the following information:

- (a) Subject title of claim
- (b) Problem identification
- (c) Order date
- (d) Term of subscription
- (e) Payment amount
- (f) Proof of payment
- (g) Change of address, name, etc.

All monies refunded by publishers will be refunded in full to libraries in cases where no replacement options are offered. In cases where titles have been discontinued and the option is offered by publisher, WT Cox Information Services will offer substitute materials for unexpired portions of subscriptions during remaining term of subscription upon approval.

WT Cox Information Services will provide written evidence of attempts to secure refunds from publishers on behalf of libraries when titles have been cancelled upon request in a timely fashion, based on publisher restriction. Libraries may receive refund as an actual reimbursement of funds via check or by accepting credit issued by WT Cox Information Services.

WT Cox Information Services will work directly with publisher to resolve duplicate copy issues if/as they occur.

WT Cox Information Services will be responsible for notifying publishers when changes of address occur but under no circumstances beyond five (5) days of notification by the library.

Memberships that include publications as part of membership entitlement are listed on initial title lists, renewals and invoices and will include information regarding associated publications such as frequency and quantity. Special membership benefits information is included as well. This information is displayed as part of bibliographic information and will be provided as a written summary as requested.

WT Cox Information Services will provide sample copies when requested by library dependent on publisher restrictions. While publishers generally cooperate with requests for sample issues, not all publishers will provide samples. This is particularly true of journal publishers. When and where possible, WT Cox Information Services will provide sample issues directly from our Replacement Issue Library in these cases. WT Cox Information Services will also purchase sample copies if directed to do so. WT Cox Information Services will also provide information on new titles when requested.

WT Cox Information Services will acquire back issues dependent on publisher allowances. Consumer titles may not be available based on publisher supply. In that case, WT Cox Information Services will attempt to provide requested back issues directly from our Replacement Issue Library. Every administrative remedy will be exhausted when publisher cannot supply back issue.

Customer service final plan is contingent on nature of problem and reasoning for lack of response by publisher. Customer service management will escalate communication up the publisher's management chain for responses. Every administrative remedy will be exhausted in the pursuit of a suitable resolution.

WT Cox Information Services shall supply missing issues at no charge when claims have been filed within publisher' stated time limits.

A report of claims filed is available at any time via CoxNet. Printed reports shall be available on demand and as requested. An annual report summarizing claims and history of resolution or lack thereof shall be provided and is available on demand.

We provide service to obtain replacement copies for defective, mutilated, or lost in transit issues. We have available to us many fulfillment agencies to assist in obtaining replacements. We also maintain an in-house Replacement Issue Library. This library is available to customers as part of basic service. Customer service representatives will exhaust all available remedies to secure missing issues for the library from outside sources to include publishers and distributors specializing in acquisition of back issue collections.

WT Cox Information Services maintains a separate building to house our Replacement Issue Library along with a clerical staff responsible for inventory and organization of issues. We maintain an inventory of the most commonly ordered magazines and journals. There are approximately 5,000 titles on any given day. Additionally, all remedies are utilized to secure missing issues from a variety of sources.

CLAIMING CAPABILITIES

Our web-based customer interface allows for electronic claims to be made at any time 24/7 and all claims are transmitted directly to your customer service team. Claim and response are viewable online at your convenience.

We encourage you to speak directly to your Customer Service Team Leader for urgent matters. Our customer service team is available from 8:00 am EST to 5:00 PM EST for your convenience. Claims may be made via telephone, fax or email as you prefer. Rush procedures are in place. In general, all phone calls will be answered within 24 hours and regular claims addressed within two working days.

Customer service representatives communicate with the publisher in a variety of ways. Primarily, claims are filed electronically as they are received. Online access issues and newspaper delivery issues are responded to immediately and by phone. Routine claims that cannot be accepted electronically based on publisher restrictions are transmitted daily by mail.

Claims are issued on a daily basis electronically where permissible by publisher. Claims are processed daily. The publishers receive concise and accurate information in a standardized format for expedited resolution. Our online system provides a reclaim mechanism for your convenience as well as a one click capability to indicate that claims have been resolved. Escalation procedures are put in place if no resolution has occurred.

If possible, we ask that you utilize our online system CoxNet for claims for quickest handling. If the claim is urgent, please contact your Customer Service Representative so she can call the publisher immediately.

Claim reports are in real time via CoxNet. Claim reports may be downloaded at any time in a variety of report formats utilizing our online management system.

Claim reports contain at a minimum:

- Title and title ID number
- Date of Order
- Detailed information about issue/issues claimed
- Current update of claim status

Claim reports may also be formatted in a date range with your specific data points as a customized report as well

Claims may be submitted via email, through CoxNet, our online management tool which is available to you 24/7 on a web-based interface. You may also speak directly to your customer service representative. Facsimile claims are accepted. We do provide for your convenience, if desired, a print claim form.

One of the most common publisher responses when filing claims is that they cannot locate the order. To reduce the possibility of this occurrence, we provide the check number, date of check and cash date. If this information is not sufficient, we will immediately provide proof of payment.

If second or third claims become necessary, they are treated aggressively. Our representatives are empowered to contact the publisher again and again until a claim is resolved to your satisfaction.

Customer service final plan is contingent on nature of problem and reasoning for lack of response by publisher. Customer service management will escalate communication up the publisher's management chain for responses. Every administrative remedy will be exhausted in the pursuit of a suitable resolution.

A report of claims filed is available at any time via CoxNet. Printed reports shall be available on demand. Both a monthly and an annual report summarizing claims and history of resolution or lack thereof shall be provided and is available on demand. Reports are always available via CoxNet, our web-based customer interface. A description of the report is detailed below.

Claims List. Report summarizing claims activities each month. Report includes claims filed, outstanding claim and resolution as indicated by publisher and shall be cumulative, by title, for all claims retaining unresolved. This report is also available for download on demand from CoxNet, our web-based customer interface.

ORDER AND DATABASE REQUIREMENTS

WT Cox Information Services acknowledges, understands and accepts that the University will place orders and renewals on an as needed basis. There is no minimum order requirements associated with your provided title collection in this Request for Proposal.

Purchase orders and renewals are accepted via email, electronic data transmission, fax, mail, telephone or via CoxNet. We ask in cases of telephone order that a written communication be issued to your customer service representative and it can be via email for your convenience.

WT Cox Information Services prepays all publishers to guarantee delivery and in advance of invoicing. WT Cox Information Services employs a positive pay system with our banking partner to prevent fraud. We are easily able to provide proof of payment on demand. Invoices issued shall serve as certification that publishers have been paid. Orders are delivered FOB destination. Any freight charges except those provided as part of publisher pricing become the responsibility of WT Cox Information Services.

WT Cox Information Services provides a web-based serials management system that meets or exceeds the requirements stated as follows:

- ✓ Contains a bibliographic database
- ✓ Includes accounting information such as payments, statements and invoices that are downloaded on demand
- ✓ Includes online claim and status reports
- ✓ Includes online access information by publisher
- ✓ Has multiple search capabilities as indicated in requirements

CANCELLATION POLICY

Our cancellation policy is as follows:

WT Cox Information Services will process cancellations up to six (6) months of the start date with publisher approval. Cancellation notifications should be made as soon as possible. After six months from the start date, cancellations will not be accepted or will be cancelled without credit in accordance with the publisher's guidelines. Publishers who do not allow cancellations or assess a cancellation fee will be so indicated on your invoice.

Written cancellation notices shall be sent to publishers, with an acknowledgment sent to the Libraries.

WT Cox Information Services will credit your account with the amount equal to the return of monies by the publisher less the cancellation processing fee. The cancellation fee is 10% of the amount paid with a minimum of \$10. Credits can be applied to outstanding invoices or refunded when the invoice is paid in full. You would make your request directly to your customer service representative. Credits expire one year from date of issue.

Refunds of any unexpired portions of orders shall be requested for all timely (i.e., as specified by the publisher) cancellations, and refund credits for the full amounts refunded by the publishers shall be processed for the Libraries.

Canceled titles shall automatically be deleted from the next main renewal invoice list.

Orders are prepaid and transmitted to publishers electronically where allowable to guarantee continuous service and should be received approximately 60 days prior to January 1 start requirements.

WT Cox Information Services shall automatically notify the University about any title increases that exceed benchmarks set by the University. This increase percentage will be customizable to any amount and will be available for January 2016 start dates. The University will have the option to cancel titles identified before order cycle.

CLAIMS/STATUS REPORTS and FULFILLMENT REQUIREMENTS

Claim status reports are available in real time via CoxNet. Regular report schedules can be established during Transition.

Claim reports are generated every 30 days. Unresolved claims remain active until satisfactory resolution occurs. Claim reports may be downloaded at any time in a variety of report formats utilizing our online management system CoxNet.

Claim reports contain at a minimum:

- Title and title ID number
- Date of Order

Detailed information about issue/issues claimed
Current update of claim status

Claim reports may also be formatted in a date range with your specific data points as a customized report as well

Claims may be submitted via email, through CoxNet, our online management tool which is available to you 24/7 on a web-based interface. You may also speak directly to your customer service representative. Facsimile claims are accepted. We do provide for your convenience, if desired, a print claim form.

Customer service representatives return phone calls within 24 hours during the regular business week. Claims are reviewed daily and responded to within two days. All customer service team leaders are fully supported by clerical staff for expedient handling of problem resolution.

Title change reports are available on demand via CoxNet and available in real time. There is a tab in the CoxNet module where title notifications are provided. Title change reports include any bibliographic change such as name changes and merges as well as publication schedule delays.

INVOICING AND STATEMENT REQUIREMENTS

WT Cox Information Services shall supply annual renewal lists, invoices and credit statements.

Each renewal and invoice shall include the following information:

Charge-to and ship-to address as instructed;

Purchase order number or order authority as instructed;

Complete title of each periodical billed, in alphabetical sequence unless otherwise instructed;

Number of copies being ordered for each subscription, with all prices shown on each page of the invoice;

Frequency of each publication;

Starting and expiration dates of each title;

Inclusive volumes if applicable;

Unique customer information service line computer fields (90 characters or more) for any unique, library specified-codes necessary. Data to be below each title on the invoice and used to manipulate library title information (account numbers, fund numbers, departmental codes, holding records, subject classifications, order numbers, and other types of recordkeeping data).

Foreign publications identified;

Titles which are parts of memberships or combination subscriptions identified.

Titles which are free to the University identified.

Publisher ordering term restrictions noted.

Updating information concerning title mergers, name changes, availability status, direct order requirements, or other data reported on a special supplement attached at the end of the invoice so that it can be removed and library files posted without affecting or delaying normal processing of the invoice;

The total of all published prices, with all service charges totaled/discouts, and the net total amount shown clearly on the last page of the invoice;

WT Cox Information Services shall supply print copies of each invoice, credit and any supplemental billing. Supplemental invoices will be applied against any remaining balance of an early payment or prepayment as authorized by University.

WT Cox Information Services shall issue credits as separate payment documents and not included in invoices.

WT Cox Information Services shall issue the large annual renewal billing as required.

With the exception of those titles "billed as published", titles shall be invoiced only once per year and only after prices are set by the publisher.

Main invoice will be supplied by date designated by Library based on funding. WT Cox Information Services will supply both printed invoices and electronic invoices.

Invoices shall be presented as required. Funding codes can be detailed on main invoice or provided on separated invoices by funding codes if desired. Each invoice is given a unique number which is never duplicated. Each invoice is dated for numerical and chronological filing identification.

All documents can be presented in ILS compatible/machine readable format for export. Reports are available in PDF, CSV and Excel and are provided at no charge. They are also available for download on CDs if/as needed. All internal documents are available via CoxNet 24/7. Print copies will be provided if requested.

Invoices are provided in both print and electronic format. Electronic invoices shall be compatible with Triple III interface.

WT Cox Information Services has proven ability to interface electronically with the Innovative Interfaces, Inc. automated acquisitions system through the successful loading of invoice, credit, and supplemental invoice data.

Printed itemized invoices shall be provided to the Libraries showing a billing of each title at the current published price in effect at the time of invoice processing, and shall be supplied at the same time as the electronic invoices.

Original printed invoices shall be provided for each transaction and are also downloaded via CoxNet.

A schedule of statement issuance shall be established during Transition.

HOW WE MEET OR EXCEED THE STATEMENT OF WORK REQUIREMENTS

WT Cox Information Services provides the best customer service in the industry. WT Cox Information Services works closely with personnel to form solid working relationships to ensure a successful partnership. Consistent communication is the key to the most efficient management of library collections. We work as a team with library staff. Free and open communication and information needed willingly provided in a timely fashion will enhance our most effective relationship.

Because we are flexible and without all the layers of bureaucracy in some larger agencies, we are able to react quickly to changes desired by our customers. Our employees are empowered to work on your behalf. Your customer service team reacts quickly to problems and has the knowledge and the authority to act on issues for clear, quick and consistent remedies. We recognize widely accepted industry standards and constantly evaluate and then update our processes and procedures to reflect current best practice.

WT Cox Information Services recognizes that the fast-paced and ever-changing world of electronic subscriptions provides a significant challenge for both libraries and serials vendors. We are dedicated to staying at the forefront of these changes by adapting our internal systems to meet the needs of our customers. Our newly designed backend system and knowledge base has been specifically structured to capture the additional data elements that are and will be required to support the acquisition, access and management of electronic resources.

Our internal database has also been designed to automatically exchange data between libraries, publishers and hosts to gather the necessary metadata to integrate with our business partners and customers. Our company has dedicated itself to being a resource by becoming partners in the electronic environment and offer electronic journal management solutions that include management modules, license agreement facilitation, usage statistics reports and open access capabilities within our system. Our primary customer portal, CoxNet, has been designed specifically to provide an efficient and effective web interface to manage serials. Enhancements are absorbed into the existing system seamlessly. System errors and downtimes are practically nonexistent thus reducing problems of day-to-day collection management tasks.

Finally, we have enhanced and increased our staff with industry recognized professionals who are both experienced and knowledgeable in the electronic environment. We continue to develop internal systems to accommodate library technology needs. In recognition of major standards being developed for distributing relevant journal data to libraries; WT Cox Information Services is continually developing systems and applications for integration with these varied and ever changing standard formats. WT Cox Information Services has ongoing research and development personnel working towards compatibility with emerging systems.

We have a dedicated IT director/project manager dedicated to standards implementation and development of appropriate standards utilizing emerging technologies at all times. Our systems are being enhanced on a daily basis to meet the demands of the changing landscape. Future enhancements are focused on our customer interface and the ongoing development of these enhancements.

TRAINING

Our company operates with a team approach in order to maintain quality control, scheduling of timely deliveries, tracking charges and satisfaction of reporting requirements. At all stages of order processing, invoicing, renewals and customer service, we conduct strict quality assurance measures. Our management team is completely accessible to assist with the resolution of any service problems. WT Cox Information Services has a strong history of providing exceptional customer service. We enjoy an excellent reputation in the library community.

As new technologies are developed or enhancements are offered in our internal and external systems, company-wide training sessions occur and documentation is distributed internally with key features and functions noted. Both full-time and part-time employees are given the same training.

The transition team and the customer service team are on point to provide training on our web-based interface for collection management as well as training for information service products you may request. Training is provided via webinar individually or within a group of staff members as the Library requests or may be provided on-site as requested. Our systems are quite easy to use and are intuitive. Regional Sales Directors are fully versed in training on our systems and are also available to you on request.

Our transition specialist is available on-site and your customer service team leader is available to assist via phone, email or online or on-site if desirable. As necessary or desirable, written documentation is provided.

LOOKING TOWARD THE FUTURE

WT Cox Information Services recognizes that the fast-paced and every-changing world of electronic subscriptions provides a significant challenge for both libraries and serials vendors. We are dedicated to staying at the forefront of these changes by adapting our internal systems to meet the needs of our customers. Our newly designed backend system and knowledge base has been specifically structured to capture the additional data elements that are and will be required to support the acquisition, access and management of electronic resources.

Our internal database has also been designed to automatically exchange data between libraries, publishers and hosts to gather the necessary metadata to integrate with our business

partners and customers. We continue to form important strategic alliances with business partners in the industry to enhance our services to our customer base.

Our company has dedicated itself to being a resource by becoming partners in the electronic environment and offer electronic journal management solutions that include management modules, license agreement facilitation, usage statistics reports and open access capabilities within our system.

Our primary customer portal, CoxNet, has been designed specifically to provide an efficient and effective web interface to manage serials. Finally, we have increased our staff with industry recognized professionals who are both experienced and knowledgeable in the electronic environment. We continue to develop internal systems to accommodate library technology needs.

In recognition of major standards being developed for distributing relevant journal data to libraries; WT Cox Information Services is continually developing systems and applications for integration with these varied and ever changing standard formats. WT Cox Information Services has ongoing research and development personnel working towards compatibility with emerging systems. We have an industry renowned project manager dedicated to standards implementation and development of appropriate standards utilizing emerging technologies at all times. Our systems are being enhanced on a daily basis to meet the demands of the changing landscape. Future enhancements are focused on our customer interface and the ongoing development of these enhancements.

WT Cox Information Services continues to develop positive publisher partnerships. We have a team that seeks out new services on behalf of our customer base so that we can provide collection solutions based on customer input and trends in the marketplace.

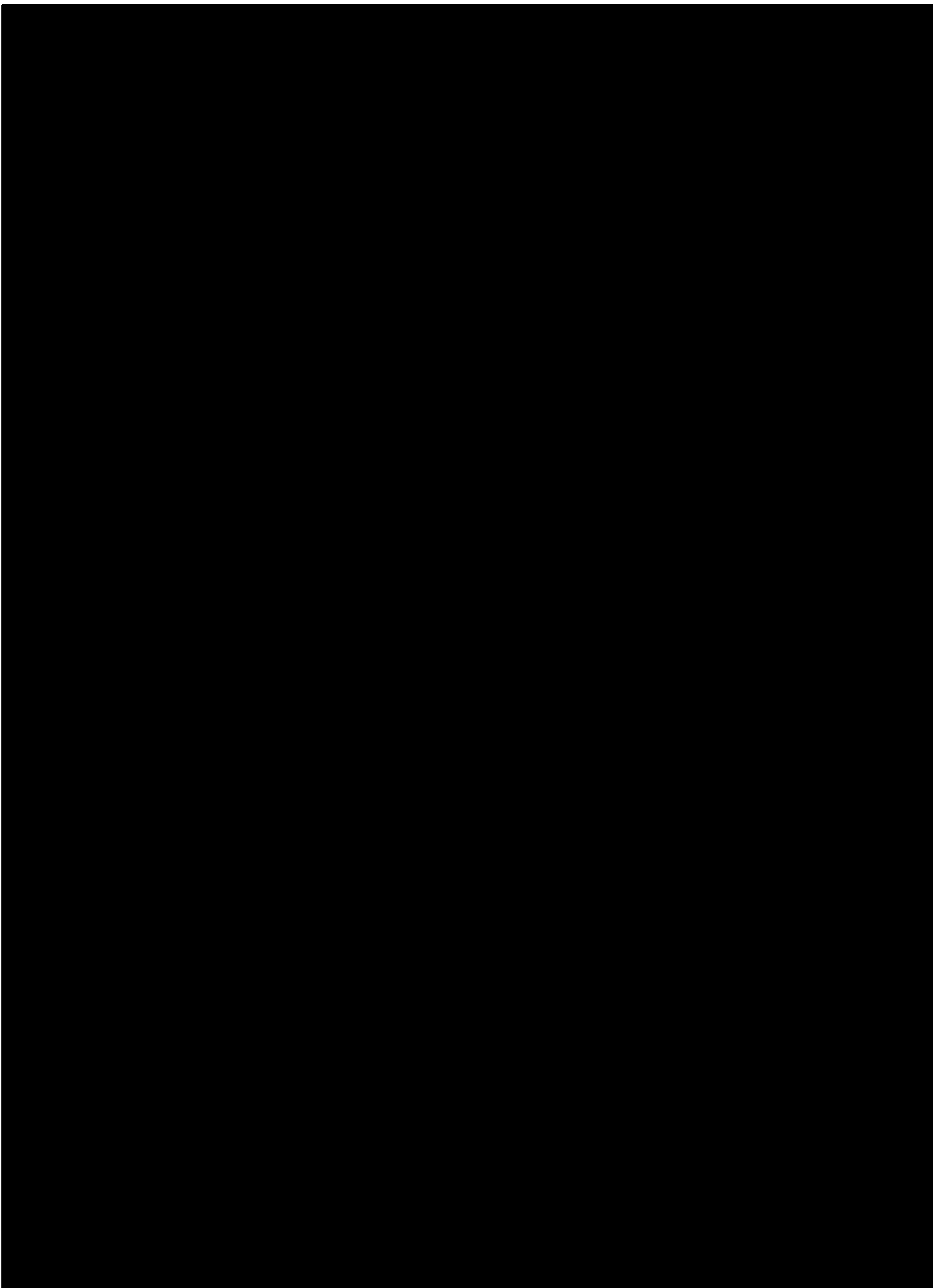
We sincerely appreciate the opportunity to provide information about our organization. Please feel free to contact us with questions during the evaluation process. We encourage you to request a one on one demonstration of our suite of services.

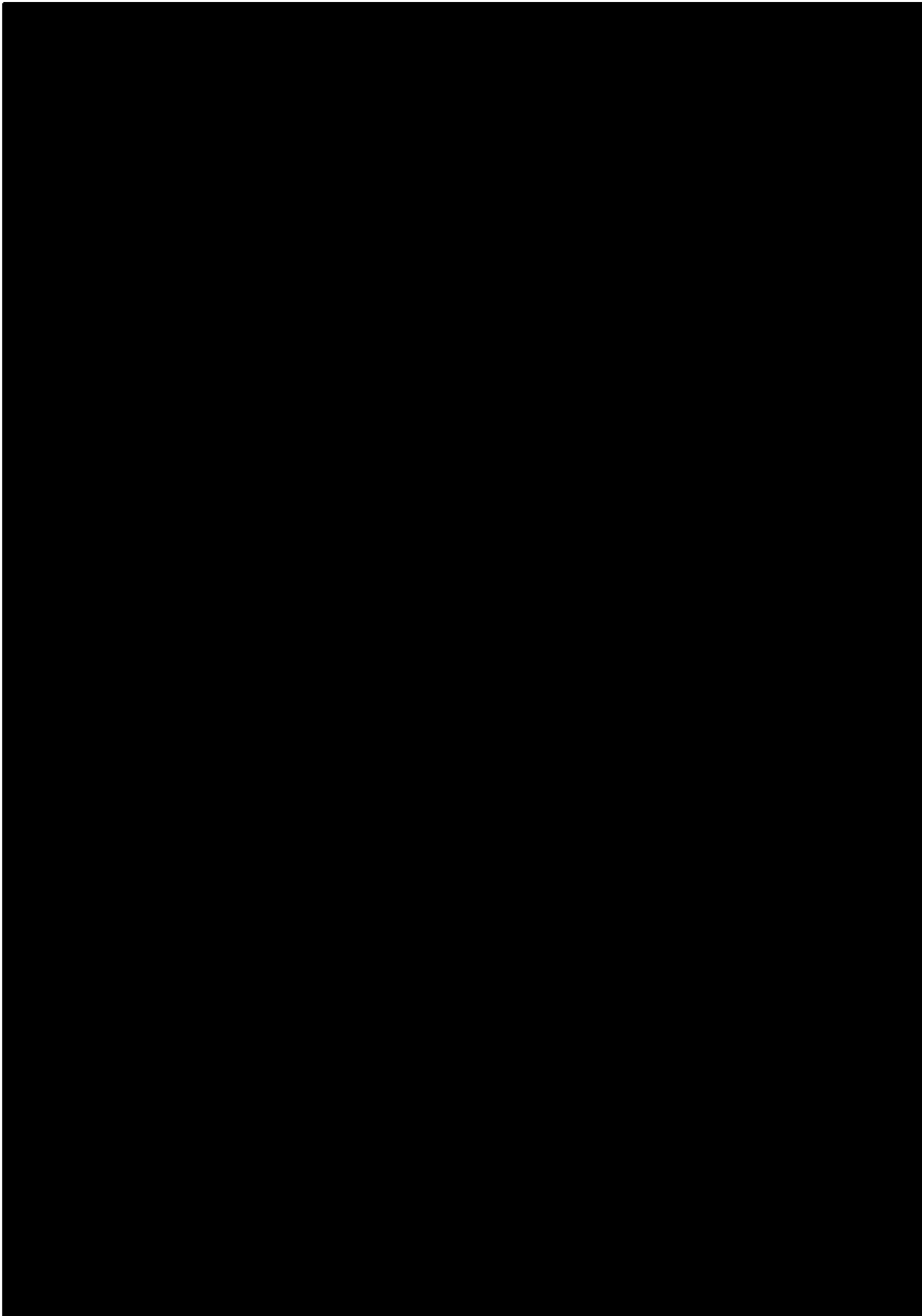


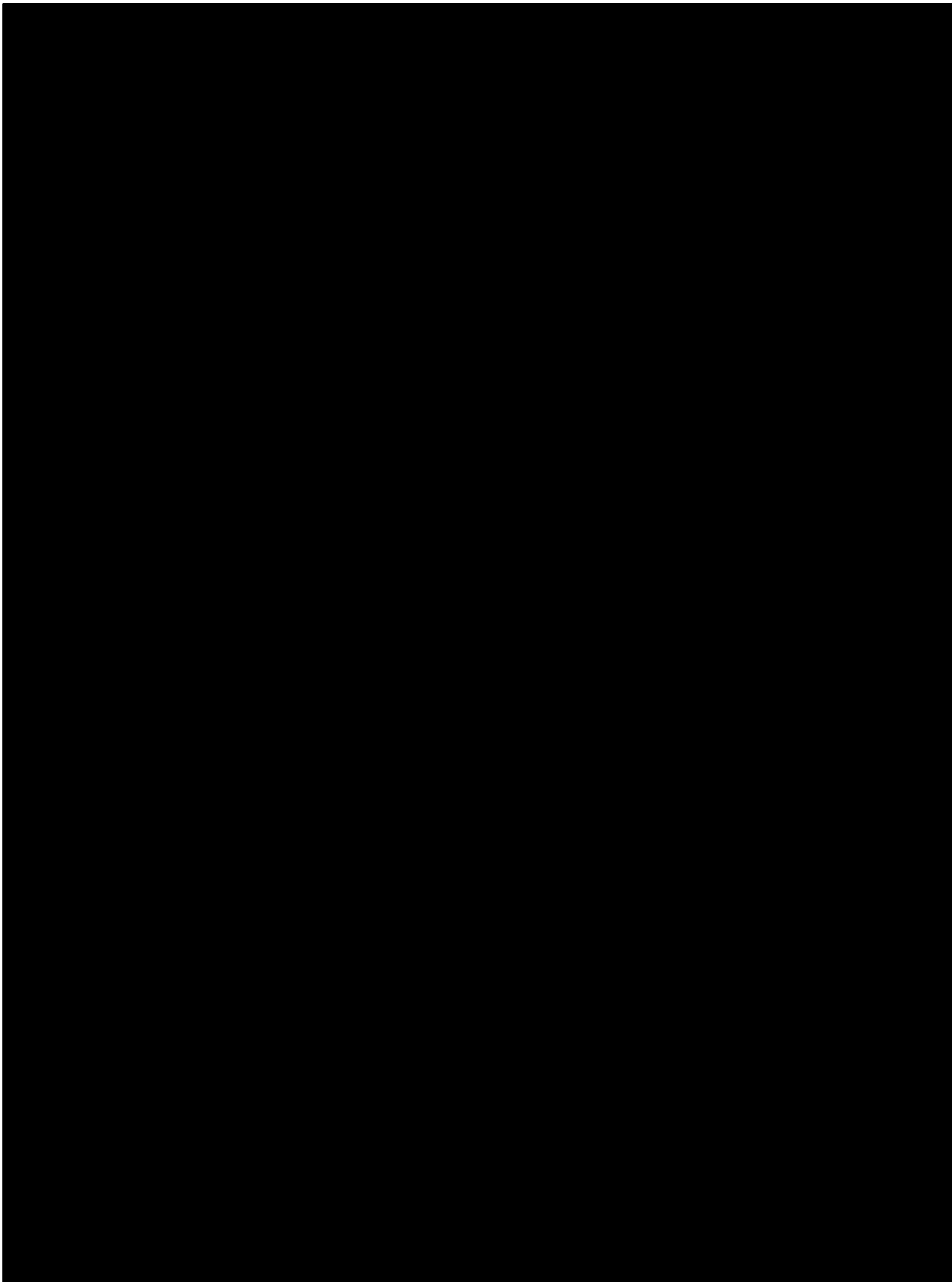
FINANCIALS

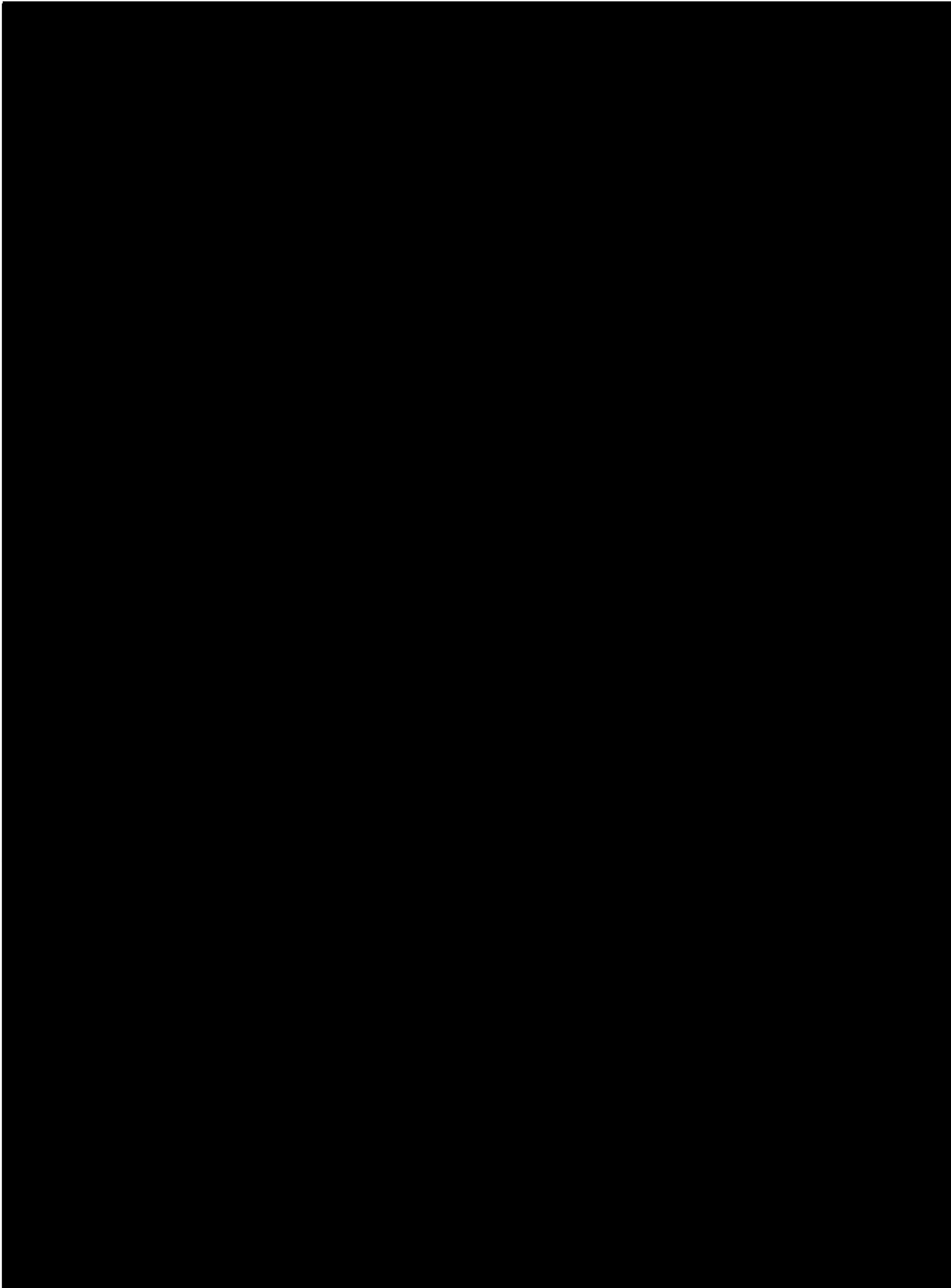
These documents are proprietary and confidential

Contact:
Debra M. Knox
Director of Contract Administration
Small Business
201 Village Road
Shallotte, NC 28470
800-571-9554, Ext. 215
dknox@wtcox.com



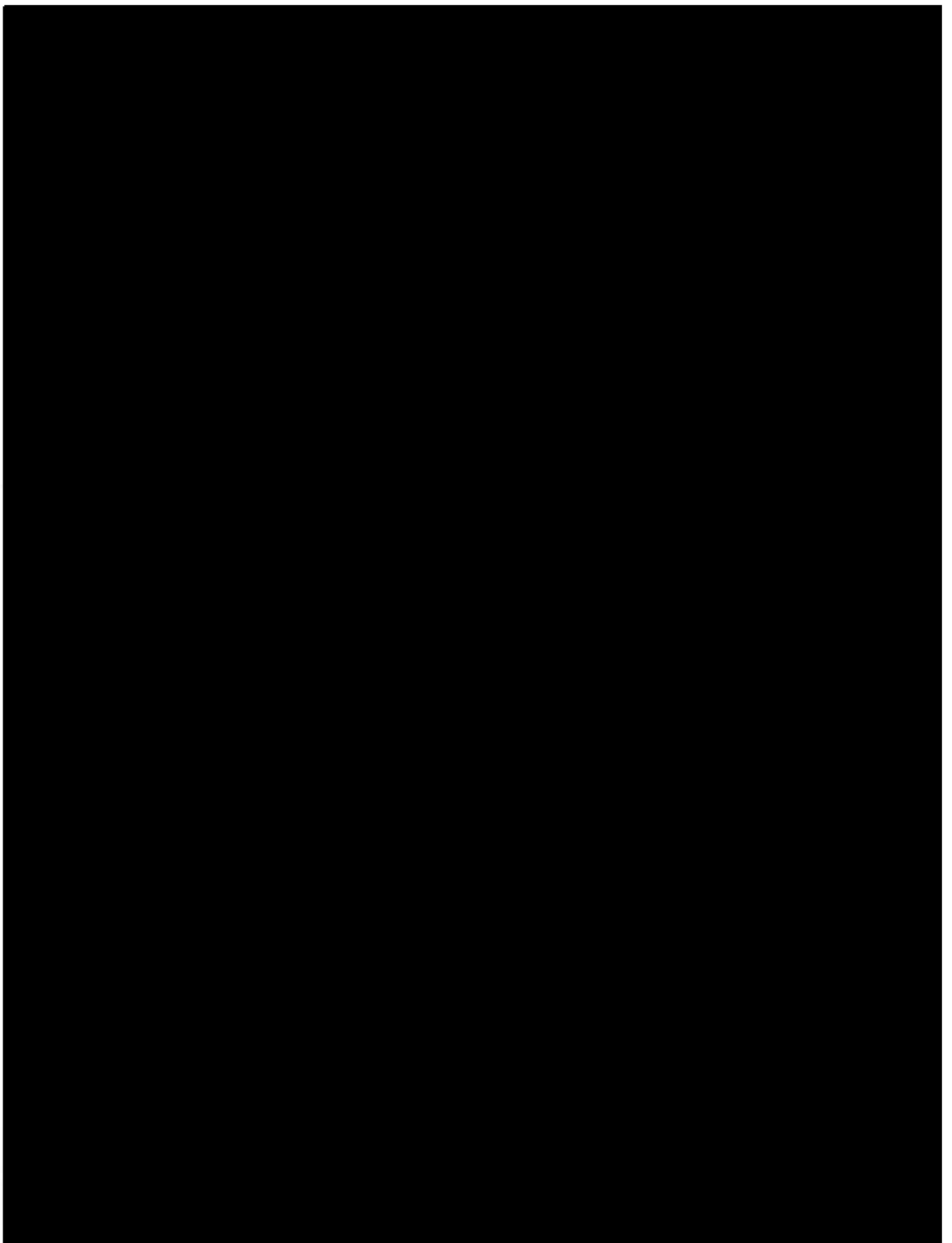


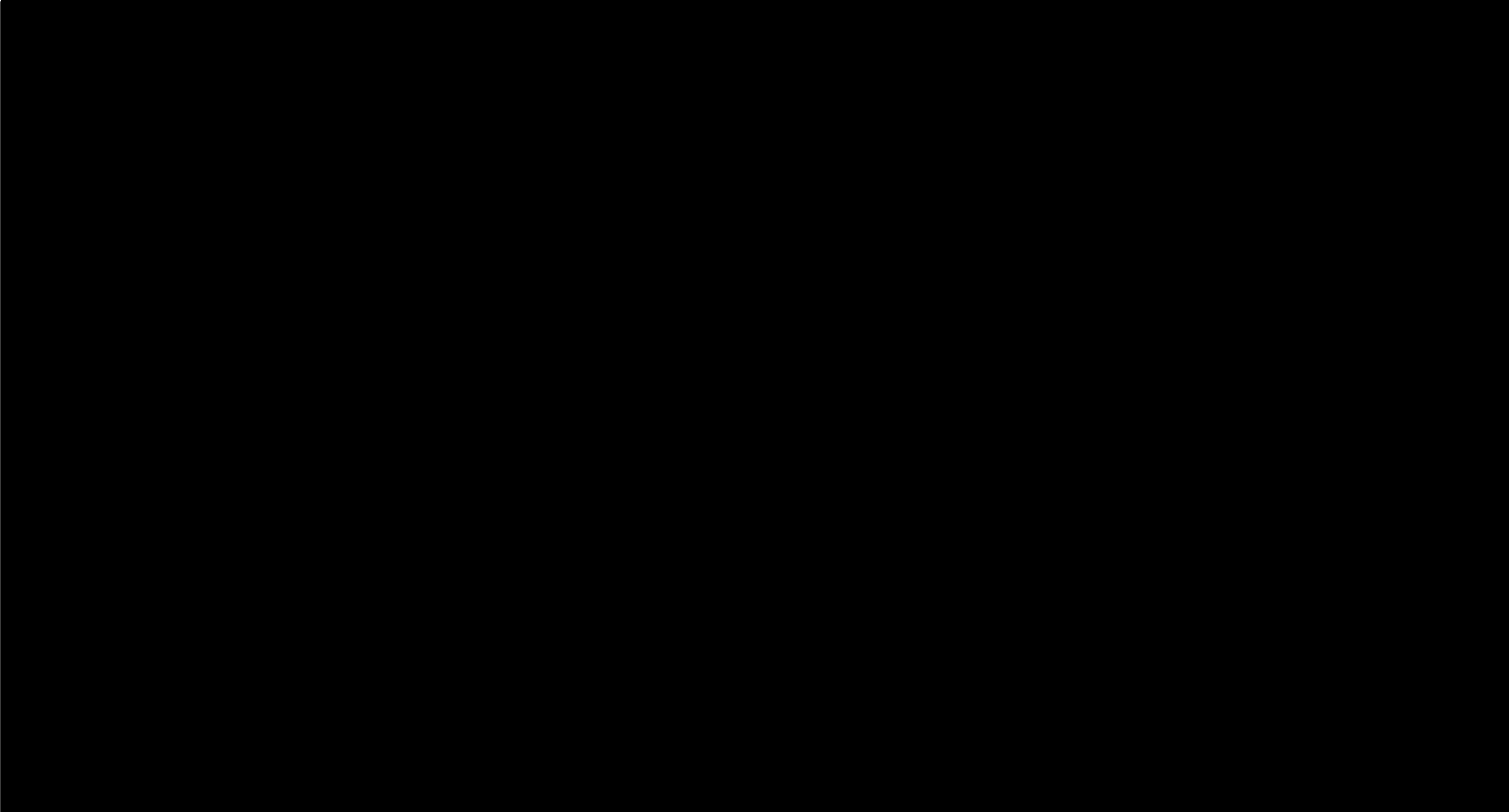




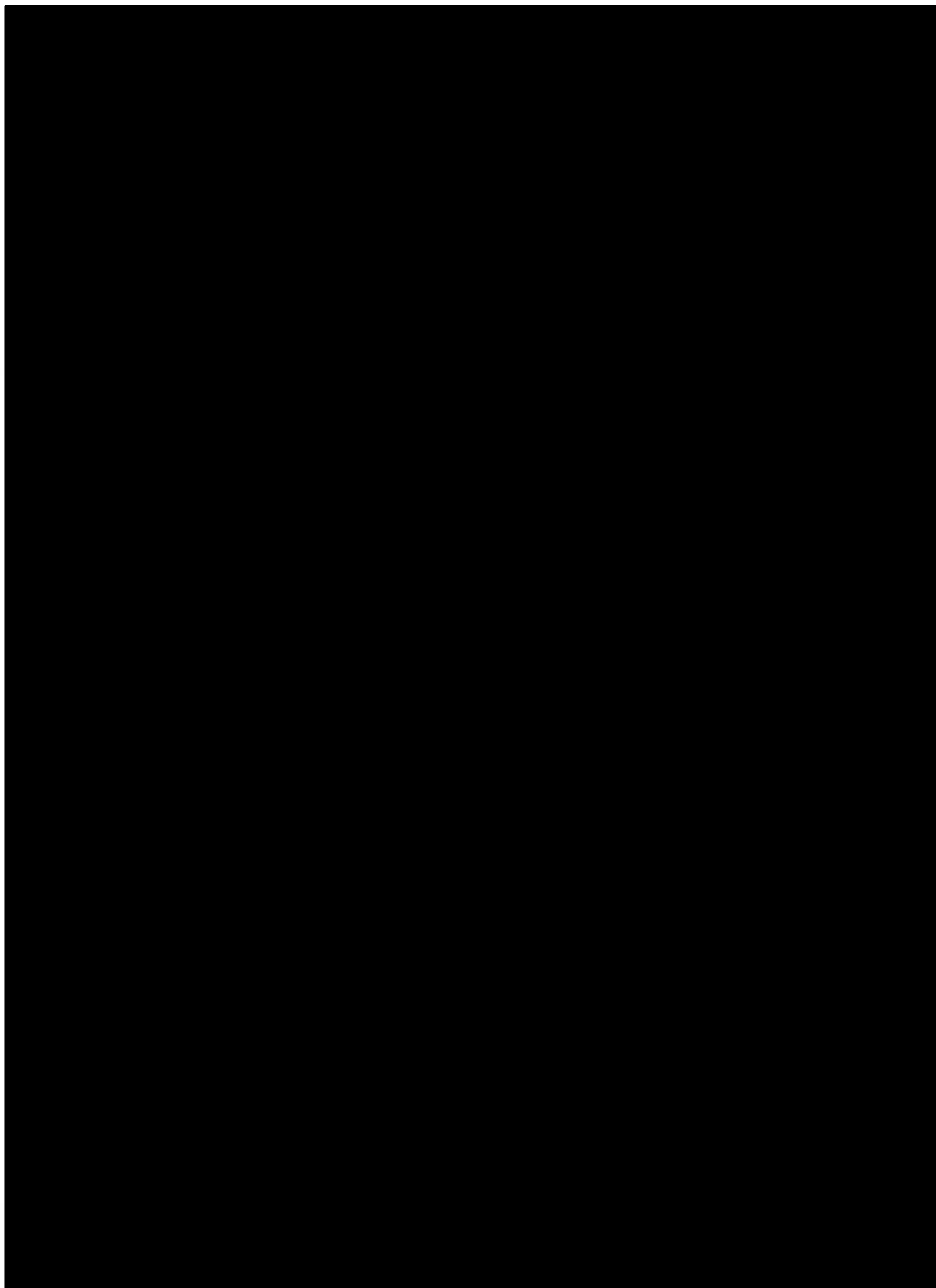


See Accountant's Report

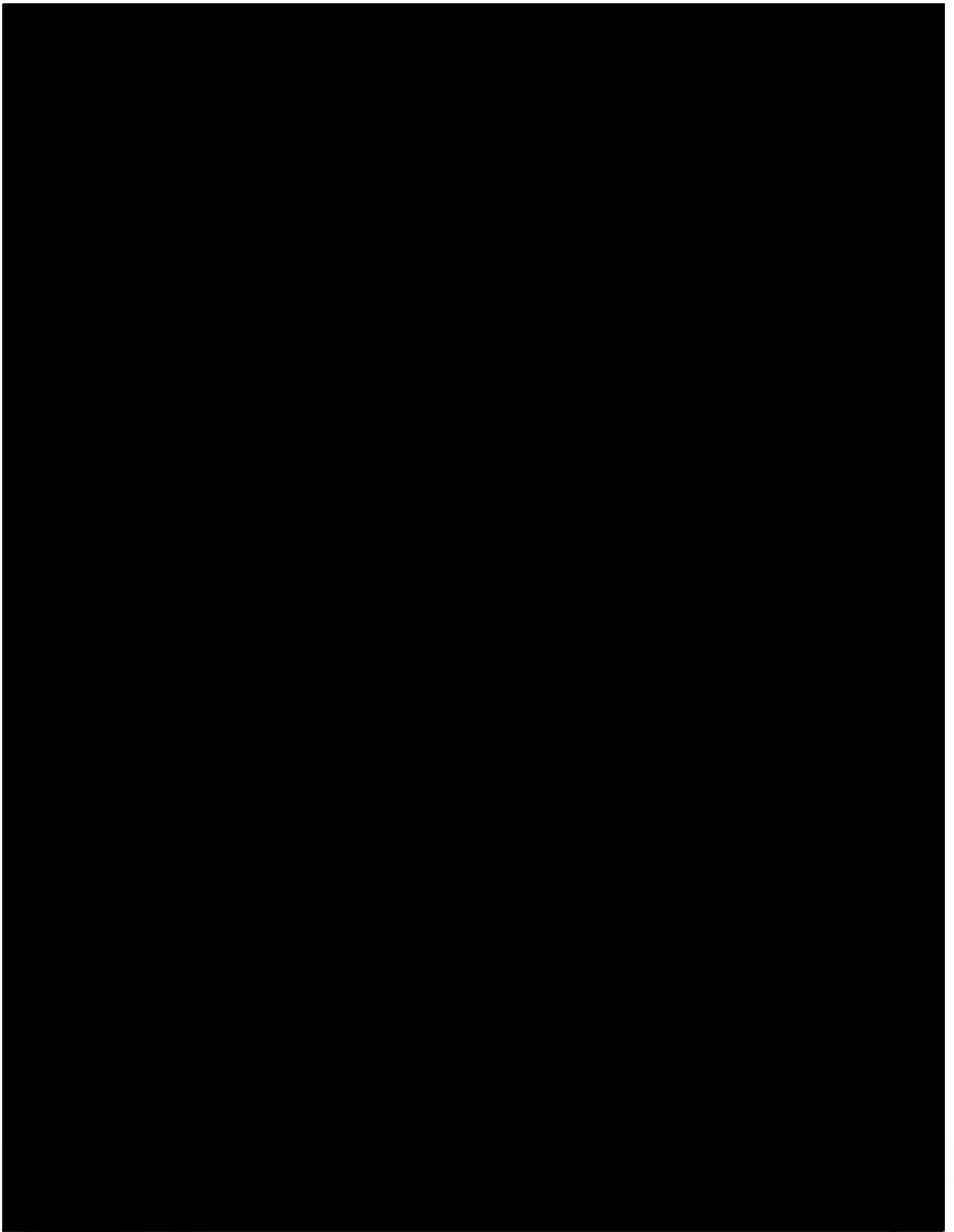


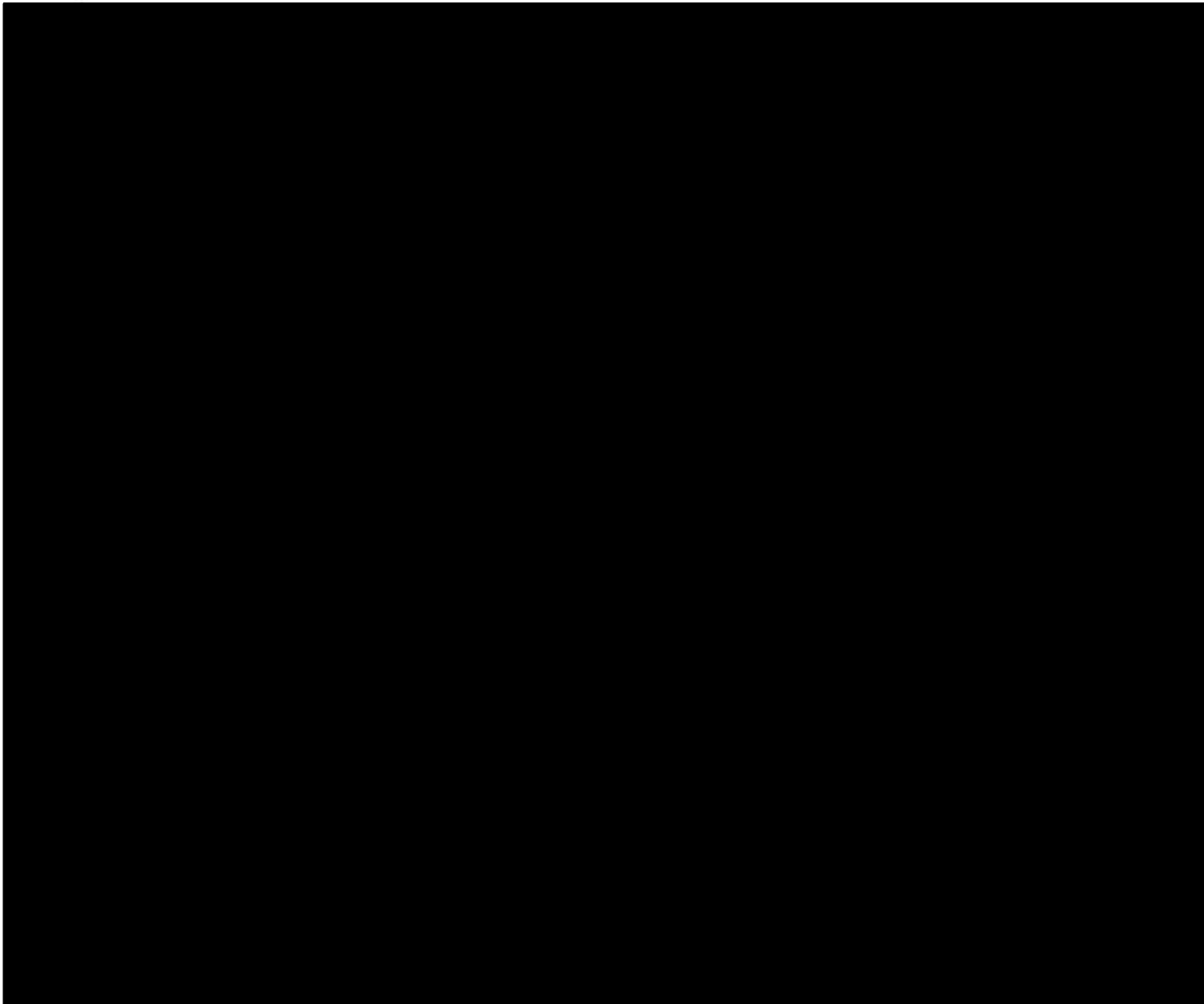


See Accountant's Report

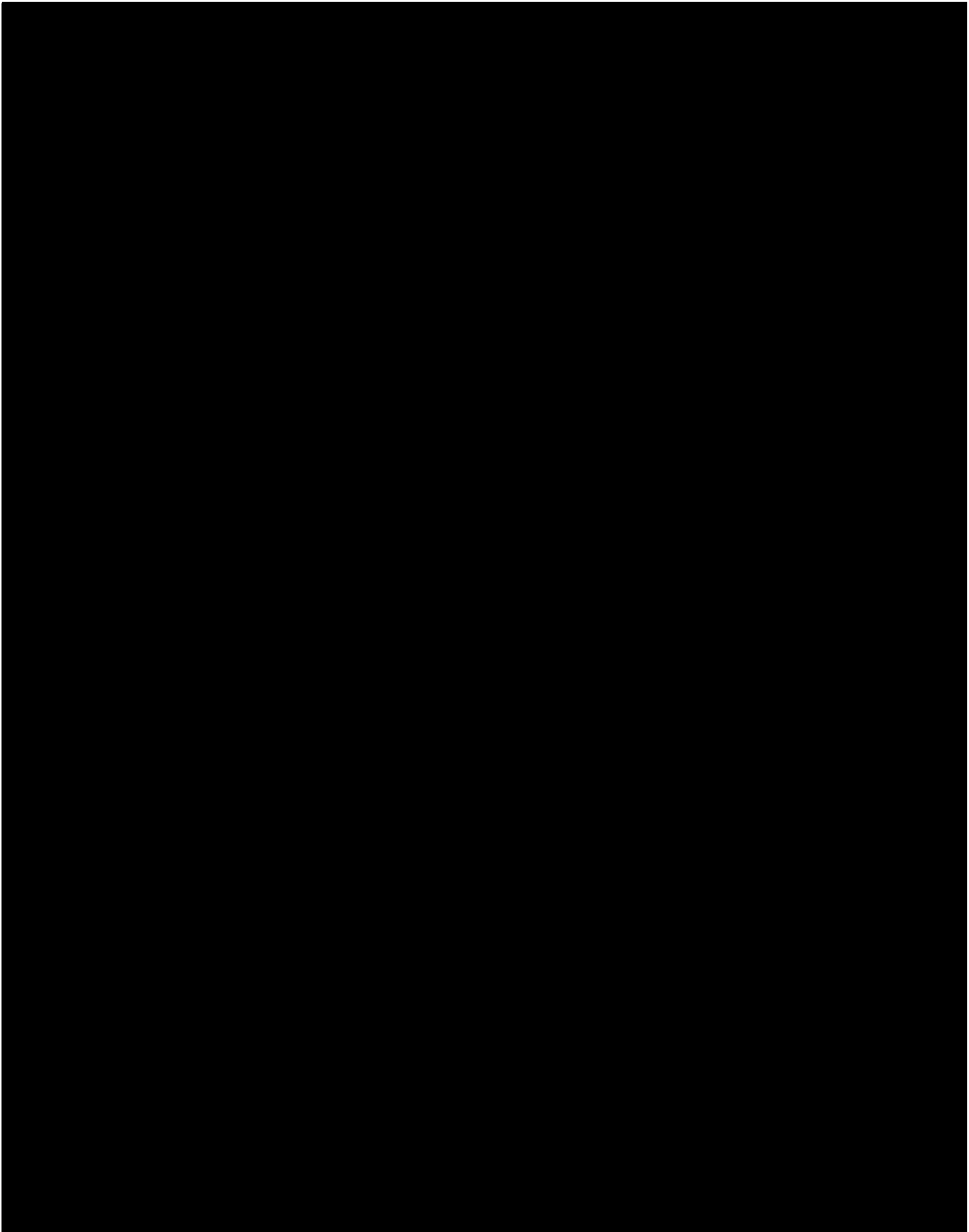


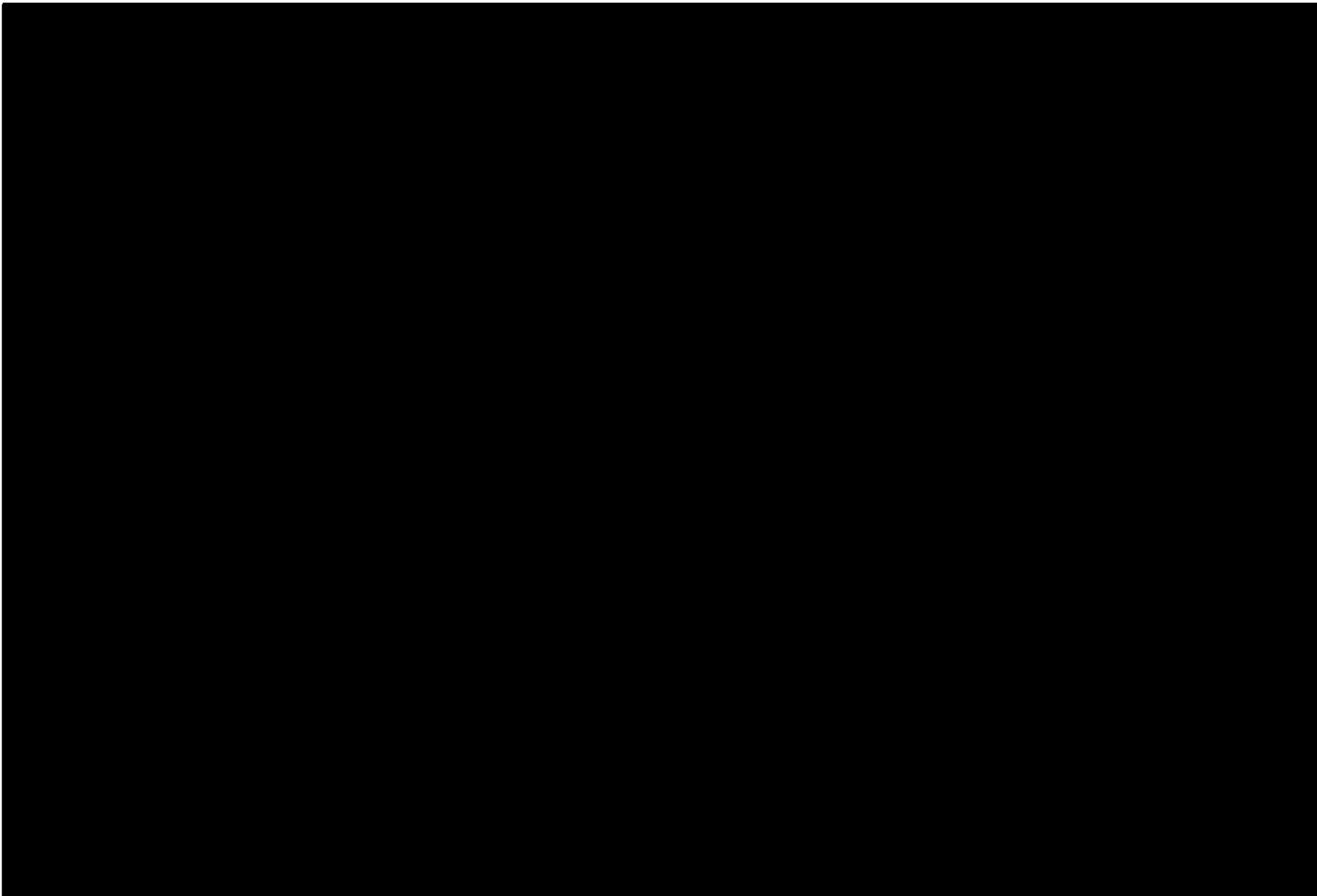






See Accountant's Report





See Accountant's Report



PRICING

Contact:
Debra M. Knox
Director of Contract Administration
Small Business
201 Village Road
Shallotte, NC 28470
800-571-9554, Ext. 215
dknox@wtcox.com

Attachment C – Subscription Pricing

NOTE: Please provide pricing for the following serial titles. The pricing should be in USD for a 2016, year-long subscription. In the case of per volume pricing, use the latest volume / item pricing on record. If FTE is used to determine tiered pricing, use a 25,000 FTE single-site doctoral university as a model.			
TITLE	FORMAT	PRICE	NOTES
AAPG BULLETIN - ONLINE	O (ONLINE)	\$534.19	
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2903845	11/11/10		WT Cox Demo Library	2054021	\$60,961.61	\$60,961.61	\$0.00	XLS / PDF
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Check 367315	CHECK	\$32,552.94	Dec 27, 2012

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Administrative Science Quarterly(Online) ISSN: 0001-8392 1 Year Issues: 4 Cox Ref Number: 85269649 ILS Number: E27086	01/01/2015	12/31/2015	\$ 271.69	1	\$ 271.69
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Adult Education Quarterly(Online) ISSN: 0741-7136 1 Year Issues: 4 Cox Ref Number: 85269516 ILS Number: E27087	01/01/2015	12/31/2015	\$ 405.01	1	\$ 405.01
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American Behavioral Scientist(Online) ISSN: 0002-7642 1 Year Issues: 12 Cox Ref Number: 85269925 ILS Number: E27091	01/01/2015	12/31/2015	\$ 2,323.00	1	\$ 2,323.00
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American Educational Research Journal(Online) ISSN: 0002-8312 1 Year Issues: 6 Cox Ref Number: 85269518 ILS Number: E27092	01/01/2015	12/31/2015	\$ 897.89	1	\$ 897.89
		Renew Fund: edu-s			
American Historical Review(Online) ISSN: 0002-8762 1 Year Issues: 5 Cox Ref Number: 85269608 ILS Number: E37992	01/01/2015	12/31/2015	\$ 482.78	1	\$ 482.78
		Renew Fund: hst			
American Journal of Clinical Nutrition(Online) ISSN: 0002-9165 1 Calendar Year Issues: 12 Cox Ref Number: 85269700 ILS Number: E27095 Cancellations accepted only before subscription begins serving	01/01/2015	12/31/2015	\$ 611.05	1	\$ 611.05
		Renew Fund: nsg-s			

INVOICE 2989960

PO: PO to follow



201 Village Road
 Shallotte, NC 28470
 PHONE: 1-800-571-9554
 FAX: 910-755-6274
 EMAIL: mbrasfield@wtcox.com
 FED ID: 56-1352557
 DUNS: 084174804

Account Number 2082867
Date 12/17/2014

Title	Start Date	Expire Date	Rate	Qty	Total Due
Eastern Communication Association Journals(Online) ISSN: 9999-9994 1 Calendar Year Issues: 10 Cox Ref Number: 85269450 ILS Number: E1029836 Includes: Communication Quarterly Communication Research Reports Qualitative Research Reports in Communication	01/01/2015	12/31/2015	\$ 352.49	1	\$ 352.49
		Renew			
		Fund: com-s			
Ecological Society of America (All Journals)(Online) 1 Calendar Year Cox Ref Number: 85269413 ILS Number: E30757 Includes: Ecological Applications Ecological Monographs Ecology (Ecological Society of America) Frontiers in Ecology & the Environment	01/01/2015	12/31/2015	\$ 1,622.06	1	\$ 1,622.06
		Renew			
		Fund: bio-s			
Ecology of Food & Nutrition(Online) ISSN: 0367-0244 1 Calendar Year Issues: 6 Cox Ref Number: 85269589 ILS Number: E38568	01/01/2015	12/31/2015	\$ 1,390.77	1	\$ 1,390.77
		Renew			
		Fund: env-s			
Economists Voice, The(Online) ISSN: 2194-6167 1 Year Issues: 1 Cox Ref Number: 85269501 ILS Number: E25023 No cancellations	01/01/2015	12/31/2015	\$ 365.62	1	\$ 365.62
		Renew			
		Fund: eco-s			
Economy & Society(Online) ISSN: 0308-5147 1 Calendar Year Issues: 4 Cox Ref Number: 85269502 ILS Number: E28294	01/01/2015	12/31/2015	\$ 631.25	1	\$ 631.25
		Renew			
		Fund: eco-s			
EDPACS: The EDP Audit, Control, and Security Newsletter (Online) ISSN: 0736-6981 1 Calendar Year Issues: 12 Cox Ref Number: 85269398 ILS Number: E27217	01/01/2015	12/31/2015	\$ 359.56	1	\$ 359.56
		Renew			
		Fund: acc-s			
Education & Urban Society(Online) ISSN: 0013-1245 1 Year Issues: 6 Cox Ref Number: 85269525 ILS Number: E27218	01/01/2015	12/31/2015	\$ 1,086.76	1	\$ 1,086.76
		Renew			
		Fund: edu-s			
Educational & Psychological Measurement(Online) ISSN: 0013-1644 1 Year Issues: 6 Cox Ref Number: 85269527 ILS Number: E27220	01/01/2015	12/31/2015	\$ 1,123.12	1	\$ 1,123.12
		Renew			
		Fund: edu-s			

INVOICE 2989960

PO: PO to follow



201 Village Road
Shallotte, NC 28470
PHONE: 1-800-571-9554
FAX: 910-755-8274
EMAIL: mbrasfield@wtcox.com
FED ID: 56-1352557
DUNS: 084174804

Account Number
2082867
Date
12/17/2014

<i>Title</i>	<i>Start Date</i>	<i>Expire Date</i>	<i>Rate</i>	<i>Qty</i>	<i>Total Due</i>
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INVOICES ARE DUE UPON RECEIPT

Your service charge of 1.00% has been applied to the items above.

TAX EXEMPTION ID E-9990-9022-07
TOTAL AMOUNT \$ 551,410.23
TOTAL DUE \$ 551,410.23
CREDITED/PAID (\$ 551,410.23)
REMAINING BALANCE \$ 0.00

Rates Are Calculated From Current Publisher List Price

Outstanding balances over 30 days will be subject to a 1% monthly finance charge. Payment by check or wire transfer is the preferred method of payment.

Browser: Mozilla Firefox
 URL: http://www.wtcox.com/447...
 Related Links: Direct Tv Offers, Buy Gold And Silver, Prepaid Cell Phone Service, Meal Planner, Designer Handbags, Online Bachelor Degree, Affordable Health Insurance Plans, Online Payroll, Best Cell Phone, Low Cost Health Insurance
 Most Visited: Getting Started, Latest Headlines, CoxNet2, CoxNet2-CSLogin, Yahoo! Mail, Yahoo! News, Yahoo!, Customize Links, Free Hotmail, My Yahoo!, Windows Marketplace, Windows Media
 Search: Search, Safe, Do Not Track, Facebook, Performance

DEPT OF VETERANS AFFAIRS

FMS
 PO BOX 149971
 AUSTIN TX 78714-8971

CREDIT SUMMARY
 01/01/2013 thru 02/19/2014

WT.COX
 Information Services
 201 Village Rd.
 Shallotte, NC 28470
 02/19/2014

Issue Date	Credit Memo No	Customer Name	ID	Title	Reason	Amount	Balance
04/10/2013	1567132	DEPT OF VETERANS AFFAIRS	2077968	Clin-Alert	Cancelled Title	\$994.69	\$160.82
04/19/2013	1567342	DEPT OF VETERANS AFFAIRS	2079659	Coping with Cancer	Incorrect Rate Used	\$465.00	\$376.00
05/06/2013	1568039	DEPT OF VETERANS AFFAIRS	2055863	US Identification Manual with Updates	Cancelled Title	\$226.00	\$138.50
05/07/2013	1568244	DEPT OF VETERANS AFFAIRS	2077244	American Heritage	Cancelled Title	\$24.00	\$24.00
05/10/2013	1568456	DEPT OF VETERANS AFFAIRS	2079427	New York Times National Edition Mon-Fri (Carrier)	Cancelled Title	\$422.65	\$422.65
05/22/2013	1568886	DEPT OF VETERANS AFFAIRS	2055854	AACR Journal Suite (Single User)	Cancelled Title	\$2413.42	\$2413.42
01/06/2014	1575628	DEPT OF VETERANS AFFAIRS	2056073	Journal of Nutritional Biochemistry	Cancelled Title	\$2403.71	\$116.71
Total of all available credit balances as of 02/19/2014 =						\$3652.10	

Please note - Credits must be used within 1 year of issue date. Please make use of older credits first, when possible. Thank You.

9:38 AM
2/19/2014

CREDIT MEMO SUMMARY

CREDIT MEMO

1568311



Account Number
2054021
Date
05/07/2013

WT Cox Demo Library
 WT Cox Demo Library
 Demo Library
 Shallotte NC 28412
 UNITED STATES

Reason: Cancelled Title
Title: American Heritage (Print Edition)
Invoice: 2944886
PO Num: RenewalAuthorization
Credited Amount: \$ 23.40
Credited Tax: \$ 0.00
Amount: \$ 23.40

Invoice	PO Num	Amount Used
---------	--------	-------------

Total Used	\$ 0.00
Total Remaining	\$ 23.40

Credits can be applied to outstanding invoices or refunded when the account is current. If applying, please be sure to clearly indicate which invoice number(s) you wish to apply the credit to. Refunds may be requested by returning a signed copy of the credit.

*** Credits must be used within 1 year of issue date ***

Apply Credit To Invoice No.

Signature/Date

WT Cox Information Services -Receivables - Mozilla Firefox

File Edit View History Bookmarks Tools Help

WT Cox Information Services -Receivables

WT Cox Subscriptions (US) | Home | Settings | Logout

Subscription Management System Financials Receivables

Generate Invoices Generate Supplemental Invoices Enter Payment/Credit Issue Refund Decrypt P-Card

Customer Invoices Customer Payments Customer Refunds Aged Invoices Organization Issues Statements Credit Memo Summary Org Statements Reports

1614525 Search Reset

Search By: Organization Payment Type All

From To

[Switch To Print Mode]

Payment #	Dep Date	Type	Reference	Customer	Customer ID	Org	Org ID	Parent Org	CSR	State	Credited Title	Reason	Entered By	Comment	Amount	Remain
1569156	6/3/13	WIRE_TRANSFER	101036158006170			DEPT OF VETERANS AFFAIRS	1614525	1614525					jhan@wtcox.com		\$29,159.92	\$0.06
1569086	5/30/13	CREDIT_CARD		VA Northern California Health Care System	2077968	DEPT OF VETERANS AFFAIRS	1614525	1614525		CA			jhan@wtcox.com	pp	\$229.06	\$229.06
1568990	5/28/13	WIRE_TRANSFER	101036156834135			DEPT OF VETERANS AFFAIRS	1614525	1614525					jhan@wtcox.com		\$13,095.45	\$0.00
1568886	5/22/13	CREDIT_MEMO	1568886	VA SALT LAKE CITY HEALTH CARE SYSTEM	2055854	DEPT OF VETERANS AFFAIRS	1614525	1614525		UT	AACR Journal Suite (Print + Online/ Single User)	Canceled Title			\$2,413.42	\$2,413.42
1568828	5/21/13	WIRE_TRANSFER	101036158463061			DEPT OF VETERANS AFFAIRS	1614525	1614525					jhan@wtcox.com		\$42,485.31	\$547.09
1568686	5/17/13	WIRE_TRANSFER	101036158412162	El Paso VA Health Care System	2067307	DEPT OF VETERANS AFFAIRS	1614525	1614525		TX			jhan@wtcox.com		\$13,800.83	\$0.00

Links 3:56 PM 6/4/2013

PAYMENT STATEMENT

https://demo.wtcox.com/CoxNet/notifications/titleNotificationsTeam?cid=106&action=refresh&element=2Phome.html%3Aconversation.rpt%3A76329

WT Cox Information Service...
File Edit View Favorites Tools Help

COXnet WT Cox Demo Library(2054021) | academic@demo.com | Preferences | Administrative Console | Logout

Subscriptions Title Notifications Claims Orders Quotes Renewals Invoices/Credits Reports Title Check In Featured Titles Help

Title Changes Effective From Apr 1, 2011 To To Change Type

Include All Orders From To Change Type

Results Per Page 20
Contact Customer Service

Update
Export

all a b c d e f g h i j k l m n o p q r s t u v w x y z

Title	Media Type	Change Type	Previous Value	New Value	Effective Date	Title Volume	Cox Ref Number
About Time (Print Edition)	Print	Status	active	suspended	01/25/13		81870944
Advertising Age's B To B (Print + Online)	Print - Online	Name	Advertising Age's B To B (Print - Online)	B to B Magazine (Print + Online)	12/20/11		81870949
Advertising Annual (Print Edition)	Print	Name	Advertising Annual	Advertising Annual (Print Edition)	03/06/12		81870950
Advocate (Print + Online)	Print + Online	issues	12	6	12/06/12		81870951
Advocate (Print + Online)	Print + Online	Frequency	Monthly	Bi-Monthly	12/06/12		81870951
AHIMA Advantage	Digital	Frequency	Monthly	Bi-Monthly	03/22/13		83234129
AHIMA Advantage	Digital	issues	12	6	03/22/13		83234129
AHIMA Advantage	Digital	Media Type	Print	Digital	03/22/13		83234129
Air & Space (Print Edition)	Print	Frequency	Bi-Monthly	irregular	10/03/12		83817888
Air & Space (Print Edition)	Print	issues	6	7	10/03/12		83817888
AJN Career Guide (Print Edition)	Print	Name	AJN Career Guide (Print Edition)	Nursing Career Directory (Print Edition)	08/27/12		81870954
American Artist (Print Edition)	Print	Status	active	ceased	10/10/12		81870956
American Heritage (Print Edition)	Print	Status	active	suspended	03/20/13		81870961

100% 7:28 PM 4/1/2013

CoxNet – Title Notifications Tab

The screenshot shows a web browser window with the address bar displaying 'wtcox.com'. The page title is 'WT Cox Information Service...'. The browser interface includes a search bar, navigation buttons, and a 'Sign In' link. The main content area is titled 'WT Cox Information Service' and contains the following sections:

Online Activation Details
Title: Academy of Management Journal
Media: Online
License Details: [Create License Information >>](#)

Online Activation Status
Activation Status: Pending Approval
Licensing Status: Not Completed
Registration Status: Not Completed
Confirmation Status: Not Completed

Online Activation
Licensing Notes:
Have the licensing terms been agreed to?
 Yes Save Notes

Access Instructions
Access Instructions: Online access requires first-time online subscribers to register at <http://www.bvpublications.com/cgi/activate/ibasic>. Subscriber will need to provide their account number from the confirmation letter mailed to them by the publisher, contact information, and IP address or range. An administrator username and password will need to be created. Renewal subscribers do not need to reactivate their journal subscription, online access will continue uninterrupted. Online access includes current year and one year of rolling archives. Online access support is available emailing tenalps@cirdata.com or by calling 011-44 1635 879381.

Title Access/Host:
Title URL: <http://www.aom.pace.edu/amjnew>
Publisher URL: <http://www.aonline.org/>

IP Addresses

The Windows taskbar at the bottom shows the system tray with the date '3/21/2015' and time '6:38 PM'. The taskbar includes icons for Internet Explorer, Google Chrome, and other applications.

TITLE DETAIL

WT Cox Information Service... | WT Cox Demo Library(2068263) | Notifications(164) | Documents | academic@demo.com | Sign In

Subscriptions | Online Subscriptions | Title Notifications | Claims | Orders | Renewals | Financial Documents | Reports | Title | Check In

[Return](#) | [View Publisher Policies](#) | [View Access Instructions](#) | [View Rates](#) | [View Title Notifications](#) | [View Previous/Current Orders](#)

[Contact Customer Service](#)

Title Details

Title:	Academy of Management Journal	Publisher:	Academy of Management
Media:	Online	Open Access:	No
Status:	Active	Back Issues Available:	No
Alternative Media:	Print Print + Online	Standing Order:	No
ISSN:	0001-4273	Automatic Renewal:	No
ISSN-E:			
Language:	English		
Additional Title Info:	Not available with membership to institutions		
Title Description:	Articles and research notes of an empirical nature from original research.		
Publication Notes	February, April, June, August, October, and Decembe		

Subject And Classification

LCC:	Microfilm 06020
LCC Subject:	Music
LCCN:	sc 83007019 (Link)
OCLC:	ocm01460711 (Link)

Links | 6:16 PM | 3/21/2015

TITLE DETAIL

WT Cox Information Services - Mozilla Firefox

WT Cox Information Services - wtcox.com

Media Online Alternative Media Print + Online

Status Active

ISSN 0008-4971

ISSN-E 1528-0020

Frequency Weekly LCCN 00211046 (Link)

Language English NLM 1488538-3 (Link)

Subject LCC QP91

Current Volume UDC

Number of Issues 52 DDC

Available Rates

Term	Package	Description	List Price
1 Calendar Year	No	Call for Pricing	\$0.00

Taxes and service charges are NOT included in the rates quoted above

Access Instructions and URL's

Access Instructions Online access requires first-time subscribers to activate their online subscription at <http://hematologylibrary.org/cgi/activate/ibasic>. Subscriber will need to provide their contact name, title, phone number, fax number, email address, IP address or range, and customer number located on the verification letter located on the journal mailing label. Renewal subscribers do not need to reactivate their journal subscription, online access will continue uninterrupted. Online access assistance is available by emailing ash@hematology.org or by calling 202-776-0544.

Title URL <http://dx.doi.org/10.1182/journal.hematologylibrary.org>

Publisher URL

Co-Net rev 7481
WT Cox Information Services 1-800-371-9554

Title search display of online access information, title URL and publisher URL if applicable. Online access reports for your entire collection are available in lieu of individual title search

WT Cox Information Service...
 File Edit View Favorites Tools Help

COXnet WT Cox Demo Library(2054021) | academic@demo.com | Preferences | Administrative Console | Logout

Subscriptions Title Notifications **Claims** Orders Quotes Renewals Invoices/Credits Reports Title Check In Featured Titles Help

Active Claims ▾

Search

Results Per Page 20 ▾
 Contact Customer Service

Export

all a b c d e f g h i j k l m n o p q r s t u v w x y z

Title	Volume	Issue	Reason	Entered	Ship To	Status	Resolve Claim	Notes
About Time (Print Edition)			Service Not Started (Please provide last issue received)	11/13/12	WT Cox Demo Library Demo Library	reviewed	Resolve Claim	The publisher has had printing difficulties and just finished their first issue for 2012. She is going to email you a PDF until she can provide a hard copy. Thanks, Mary
About Time (Print Edition)		11/08/12	Missing Items	11/09/12	WT Cox Demo Library Demo Library	reviewed	Resolve Claim	They only published one issue for 2012 which she is resending to you. Then the publication went digital. Thanks, Mary
America (National Catholic Weekly) (Print + Online)		12/10/12	Duplicates Received (Combine And Extend)	12/12/12	WT Cox Demo Library Demo Library	reviewed	Resolve Claim	The publisher has combined and extended. The new expiration date is Dec 2014. Thank you, pc
American Artist (Print Edition)		02/01/12	Duplicates Received (Combine And Extend)	12/19/11	WT Cox Demo Library Demo Library	reviewed	Resolve Claim	
American Artist (Print Edition)		09/26/11	Missing Items	09/26/11	WT Cox Demo Library Demo Library	reviewed	Resolve Claim	

We just received one copy of the Mar/Apr 2011 issue. Via

100%

7:29 PM
4/1/2013

CoxNet – Claims Tab

WT Cox Demo Library(2054021) | Notifications(1) | Documents | academic@demo.com

Subscriptions | Title Notifications | **Claims** | Orders | Quotes | Renewals | Financial Documents | Reports | Title | Check In | Featured Titles | New Titles | Help

Active Claims ▾ | Search | Results Per Page 20 ▾ | Contact Customer Service

Export

all a b c d e f g h i j k l m n o p q r s t u v w x y z

Title	Media	Languages	Volume	Issue	Publication Date	Times issue Claimed	Reason	Entered	Ship To	Status	Resolve Claim	Notes
About Time	Print	English			11/08/12	1	Missing Items	11/08/12	WT Cox Demo Library Demo Library	Reviewed	Resolve Claim	They only published one issue for 2012 which she is resending to you. Then the publication went digital. Thanks, Mary
About Time	Print	English				1	Service Not Started	11/13/12	WT Cox Demo Library Demo Library	Reviewed	Resolve Claim	The publisher has had printing difficulties and just finished their first issue for 2012. She is going to email you a PDF until she can provide a hard copy. Thanks, Mary
America (National Catholic Weekly)	Print + Online	English			12/10/12	1	Duplicates Received	12/12/12	WT Cox Demo Library Demo Library	Reviewed	Resolve Claim	The publisher has combined and extended. The new expiration date is Dec 2014. Thank you, pc
American Family Physician (Limited Access)	Print + Online	English			05/03/13	1	Damaged Issue	05/03/13	WT Cox Demo Library Demo Library	Reviewed	Resolve Claim	The publisher is resending the May 1st issue. Thanks, Mary

9:24 AM 2/19/2014

CLAIM DETAIL

WT Cox Information Services - Mozilla Firefox

WT Cox Information Services -

WT Cox Subscriptions (US) | wtcox.com

Media Online Alternative Media [Print + Online](#)

Status Active

ISSN 0006-4971

ISSN-E 1528-0020

Frequency Weekly LCCN 00211048 ([Link](#))

Language English NLM 1468538-3 ([Link](#))

Subject LCC QP91

Current Volume UDC

Number of Issues 52 DDC

Available Rates

Term	Package	Description	List Price
1 Calendar Year	No	Call for Pricing	\$0.00

Taxes and service charges are NOT included in the rates quoted above

Access Instructions and URL's

Access Instructions Online access requires first-time subscribers to activate their online subscription at <http://hematologylibrary.org/cgi/activate/basic>. Subscriber will need to provide their contact name, title, phone number, fax number, email address, IP address or range, and customer number located on the verification letter located on the journal mailing label. Renewal subscribers do not need to reactivate their journal subscription, online access will continue uninterrupted. Online access assistance is available by emailing ash@hematology.org or by calling 202-776-0544.

Title URL <http://info.library.hematology.org>

Publisher URL

CoxNet res: 7481
WT Cox Information Services: 1-800-371-3554

Title search display of online access information, title URL and publisher URL if applicable. Online access reports for your entire collection are available in lieu of individual title search

WT Cox Information Servic...
 http://demo.wtcox.com/...
 WT Cox Demo Library(2068263)

Filter By Status: All | Filter By Type: [v]
 Return | Select All | Unselect All | Mark Selected Read | Mark Selected Unread | Remove Selected

Notifications(164) | Documents | academic@demo.com | Sign In

- Price Updates
- New Renewal: 207670
- Claim Response for: Educational Leadership(Print + Online + Archive)

View All Notifications

Select	Subject	From	Time Sent	Type
<input type="checkbox"/>	Price Updates		03/01/15 08:00:54 AM	User Price Updates
<input type="checkbox"/>	New Renewal: 207670		02/10/15 09:00:02 AM	Renewal Generated
<input type="checkbox"/>	Claim Response for: Educational Leadership(Print + Online + Archive)		02/09/15 10:53:42 AM	Claim Response
<input type="checkbox"/>	New Title Notification: Biotechnic & Histochemistry (Single Size)(Online)		02/02/15 11:09:50 AM	Customer Title Notification
<input type="checkbox"/>	Price Updates		02/01/15 09:09:42 AM	User Price Updates
<input type="checkbox"/>	Claim Response for: Smithsonian Magazine(Print)		01/30/15 10:51:18 AM	Claim Response
<input type="checkbox"/>	Claim Response for: Educational Leadership(Print + Online + Archive)		01/29/15 04:33:53 PM	Claim Response
<input type="checkbox"/>	New Title Notification: Ebony(Print)		01/28/15 01:19:59 PM	Customer Title Notification
<input type="checkbox"/>	New Title Notification: Ebony(Print)		01/28/15 01:19:59 PM	Customer Title Notification
<input type="checkbox"/>	New Title Notification: Ebony(Print)		01/28/15 01:19:59 PM	Customer Title Notification
<input type="checkbox"/>	New Title Notification: New York Magazine(Print)		01/26/15 11:55:10 AM	Customer Title Notification
<input type="checkbox"/>	Claim Response for: Professional Artist(Print)		01/16/15 04:07:09 PM	Claim Response

Links | 6:05 PM 3/21/2015

TITLE NOTIFICATION Module

WT Cox Information Service... WT Cox Demo Library(2068263) Notifications(164) Documents academic@demo.com

Subscriptions Online Subscriptions Title Notifications Claims Orders Renewals Financial Documents Reports Title Check In

Current Include Items with Future Start Dates: Package Search By: Title Contains Search Results Per Page 20 [Customize View] Contact Customer Service

Export

all a b c d e f g h i j k l m n o p q r s t u v w x y z

Title	Media	Customer	Customer ID	Publisher	Cox Ref Number	Start	Expire	Activation Status	Last Updated	Online Access URL	Package
Child Development Package	Online	WT Cox Demo Library	2066263	John Wiley & Sons Inc	83820426	01/01/15	12/31/15	Pending Registration			Child Development Package
Communication Culture Package	Online	WT Cox Demo Library	2066263	John Wiley & Sons Inc	83820456	01/01/15	12/31/15	Pending Registration			Communication Culture Package
Criminology Package	Online	WT Cox Demo Library	2066263	John Wiley & Sons Inc	83820453	01/01/15	12/31/15	Pending Registration			Criminology Package
Family Package	Online	WT Cox Demo Library	2066263	John Wiley & Sons Inc	83821211	01/01/15	12/31/15	Pending Registration			Family Package

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RSS For Notifications

Links 4:01 PM 3/30/2015

SCREENSHOT PACKAGE VIEW ONE

WT Cox Information Service...

WT Cox Demo Library(2068263) | Notifications(164) | Documents | academic@demo.com

Subscriptions Online Subscriptions Title Notifications Claims Orders Renewals Financial Documents Reports Title Check In

Return

Online Activation Details

Title: Communication Culture Package
Media: Online
Licence Type: Site Terms And Conditions
Policies URL: <http://onlinelibrary.wiley.com/licenseAgreement>
Term of Use URL: <http://onlinelibrary.wiley.com/termsAndConditions>
License Details: [Click Here For More Information >>](#)

Online Activation Status

Activation Status: Pending Approval
Licensing Status: Not Completed
Registration Status: Not Completed
Confirmation Status: Not Completed

Online Activation

Licensing Notes:

Have the licensing terms been agreed to?
Yes Save Notes

4:03 PM 3/30/2015

SCREENSHOT PACKAGE VIEW TWO

http://demo.wtcox.com/.../online/subscriptionDetailScreen.cfm?code=480

WT Cox Information Service...

Google Search Share More Sign In

Page Safety Tools

Registration Status: Not Completed
Confirmation Status: Not Completed

Online Activation

Licensing Notes:

Have the licensing terms been agreed to?

Access Instructions

Access Instructions: Online access requires subscriber's email address and IP Address(es) provided with order. Online access is by IP authentication and EZ Proxy is permitted. Online access includes access to the current year plus 4 years of archives. Online access back to 1997 is included for enhanced access license subscribers. Subscriber retains perpetual online access to purchased year(s) upon subscription termination. Publisher will email detailed online access instructions to the subscriber. Renewal subscribers do not need to reactivate their journal subscription, online access will continue uninterrupted. Wiley Online Library online account Customer Administration page login is available at <http://onlinelibrary.wiley.com/login-options>. Online access assistance is available by emailing cs-journals@wiley.com or by calling Customer Service at 800-835-6770.

Title Access/Host:

Title URL: <http://www.wiley.com/bw/journal.asp?ref=0021-9916>, <http://www.wiley.com/bw/journal.asp?ref=1050-3293>, <http://www.wiley.com/bw/journal.asp?ref=0360-3989>, <http://www.wiley.com/bw/journal.asp?ref=1083-6101>, and <http://www.wiley.com/bw/journal.asp?ref=1753-91>

Publisher URL: <http://www.wiley.com/WileyCDA/>

IP Addresses

Begin #	End #	Hosts #
192.152.243.0	192.152.243.0	1
192.152.243.1	192.152.243.254	254

[RSS For Notifications](#)

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 WT Cox Information Services 1-800-571-4854

Links 4:04 PM 3/30/2015

SCREENSHOT PACKAGE VIEW THREE

WT Cox Information Services

Google

Search Share More

Page Safety Tools

Sign In

<input type="checkbox"/>	New Title Notification: Ebony(Print)	01/26/15 01:19:59 PM	Customer Title Notification
<input type="checkbox"/>	New Title Notification: Ebony(Print)	01/26/15 01:19:59 PM	Customer Title Notification
<input type="checkbox"/>	New Title Notification: Ebony(Print)	01/26/15 01:19:59 PM	Customer Title Notification
<input type="checkbox"/>	New Title Notification: New York Magazine(Print)	01/26/15 11:55:10 AM	Customer Title Notification
<input type="checkbox"/>	Claim Response for: Professional Artist(Print)	01/16/15 04:07:09 PM	Claim Response
<input type="checkbox"/>	Claim Response for: Harvard Business Review(Print + Online Premium Access)	01/09/15 09:43:42 AM	Claim Response
<input type="checkbox"/>	Claim Response for: Professional Artist(Print)	01/08/15 10:15:06 AM	Claim Response
<input type="checkbox"/>	New Title Notification: Journal on Excellence in College Teaching (Site License)(Online)	01/02/15 04:16:45 PM	Customer Title Notification
<input type="checkbox"/>	New Title Notification: Ebony(Print)	01/02/15 12:30:04 PM	Customer Title Notification
<input type="checkbox"/>	Claim Response for: Educational Leadership(Print + Online + Archive)	12/01/14 12:33:17 PM	Claim Response
<input type="checkbox"/>	New Title Notification: International Journal of Aging & Human Development(Online)	12/02/14 03:14:59 PM	Customer Title Notification
<input type="checkbox"/>	New Title Notification: Events in Academia(Print)	12/21/14 11:27:07 AM	Customer Title Notification
<input type="checkbox"/>	New Invoice: 2989543	12/16/14 05:00:03 AM	New Customer Invoice

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Windows Taskbar: 6:30 PM 1/21/2015

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WT Cox Information Service... WT Cox Demo Library(2068263) Notifications(164) Documents academic@demo.com

Subscriptions Online Subscriptions Title Notifications Claims **Orders** Renewals Financial Documents Reports Title Check In

Results Per Page 20 Contact Customer Service

Create Order Approve Orders Export

Order ID	Received	Purchase Order No.	Subs	Status	Total Amount	Customer	Customer ID	PDF
4866897	02/08/15	4866897	3	Fulfilled	\$2,845.48	WT Cox Demo Library	2068263	
4864655	11/12/14		1	Fulfilled	\$353.30	WT Cox Demo Library	2068263	
4862850	10/08/14	P0248502	265	Fulfilled	\$180,165.55	WT Cox Demo Library	2068263	
4861025	05/10/14		1	Fulfilled	\$325.13	WT Cox Demo Library	2068263	
4858717	07/01/14	P0247251	2	Fulfilled	\$3,350.17	WT Cox Demo Library	2068263	
4867812	07/16/14	P0247261	1	Fulfilled	\$35.35	WT Cox Demo Library	2068263	
4855636	05/12/14	Apply credits	2	Fulfilled	\$23,401.70	WT Cox Demo Library	2068263	
4864585	05/23/14	Paid thru	0	Awaiting Fulfillment	\$0.00	WT Cox Demo Library	2068263	
4864493	05/22/14		3	Fulfilled	\$70.67	WT Cox Demo Library	2068263	
4861830	03/26/14	4851830	1	Fulfilled	\$236.34	WT Cox Demo Library	2068263	
4860682	03/05/14	P0243164	1	Fulfilled	\$593.85	WT Cox Demo Library	2068263	

6:12 PM 3/21/2015

ORDER DETAIL

ORDER SLIP and PREPAYMENT CHECK - Single Copy

WT COX SUBSCRIPTIONS

201 Village Road • Shallotte, NC 28470
PHONE: 910-754-3145

DATE OF ORDER	TERM	# OF SUBS
11/05/2010	1 YR	1

-2065909-37523-1683073-BASIC-

PUBLICATION NAME					
Camping Magazine (Print + Digital)					
NEW	RENEW	STARTING DATE	EXP DATE	POSTAGE	REMIT
	X	01/01/2011	01/01/2012	0.00	29.75

If your start date does not agree, Please notify W. T. Cox



CLARK COUNTY LIBRARY
1401 E FLAMINGO RD

LAS VEGAS NV 89119 USA

https://demo.wtcox.com/CoxNet2/claims/ViewClaim.seam?cid=115

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COXnet WT Cox Demo Library(2054021) | academic@demo.com | Preferences | Administrative Console | Logout

Subscriptions Title Notifications **Claims** Orders Quotes Renewals Invoices/Credits Reports Title Check In Featured Titles

Return Re-Submit Claim

Title	Claim ID	Item ID	User	Received	Reason
About Time (Print Edition) Description	5850523	84389639		Tue, Nov 13 2012 at 03:23:43 PM EST	Service Not Started (Please provide last issue received)

Dialog

Post Message

Message: Tue, Nov 13 2012 at 03:27:16 PM EST

From: mbrasfield@wtcox.com

The publisher has had printing difficulties and just finished their first issue for 2012. She is going to email you a PDF until she can provide a hard copy. Thanks, Mary

Claim Created: Tue, Nov 13 2012 at 03:23:50 PM EST

Publisher Policies

100% 7:35 PM 4/1/2013

CoxNet – Claim Detail

WT Cox Demo Library(2054021) | Notifications(1) | Documents | academic@demo.com

Subscriptions | Title Notifications | **Claims** | Orders | Quotes | Renewals | Financial Documents | Reports | Title | Check In | Featured Titles | New Titles | Help

Active Claims ▾ | Search | Results Per Page 20 ▾ | Contact Customer Service

Export

all a b c d e f g h i j k l m n o p q r s t u v w x y z

Title	Media	Languages	Volume	Issue	Publication Date	Times Issue Claimed	Reason	Entered	Ship To	Status	Resolve Claim	Notes
About Time	Print	English			11/08/12	1	Missing Items	11/08/12	WT Cox Demo Library Demo Library	Reviewed	Resolve Claim	They only published one issue for 2012 which she is resending to you. Then the publication went digital. Thanks, Mary
About Time	Print	English				1	Service Not Started	11/13/12	WT Cox Demo Library Demo Library	Reviewed	Resolve Claim	The publisher has had printing difficulties and just finished their first issue for 2012. She is going to email you a PDF until she can provide a hard copy. Thanks, Mary
America (National Catholic Weekly)	Print + Online	English			12/10/12	1	Duplicates Received	12/12/12	WT Cox Demo Library Demo Library	Reviewed	Resolve Claim	The publisher has combined and extended. The new expiration date is Dec 2014. Thank you, pc
American Family Physician (Limited Access)	Print + Online	English			05/03/13	1	Damaged Issue	05/03/13	WT Cox Demo Library Demo Library	Reviewed	Resolve Claim	The publisher is resending the May 1st issue. Thanks, Mary

9:24 AM 2/19/2014

CLAIM DETAIL

https://demo.wtcox.com/CoxNet2/reports/ReportTeam?gid=106&action=MethodInvoices&ZFHome.html%3AConversation.root%25%29

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COXnet WT Cox Demo Library(2054021) | academic@demo.com | Preferences | Administrative Console | Logout

Subscriptions | Title Notifications | Claims | Orders | Quotes | Renewals | Invoices/Credits | **Reports** | Title | Check In | Featured Titles

Reports	Description	Range	Export
Check-In			
Overdue Report	List items that are past due for check in with selected order start dates	04/01/12 — 04/01/13	[PDF] [XLS]
My Subscriptions			
Titles by Language	All active orders sorted by language		[PDF] [XLS] [CSV]
Future Orders	Future orders not yet complete	04/01/13 — 04/01/14	By Customer: [PDF] [XLS] [CSV] By Title: [PDF] [XLS] [CSV]
Irregular Titles	All irregular titles that are currently and active order		[PDF] [XLS] [CSV]
Online Electronic Journals	List of all electronic journals	Start Date: 04/01/12	[PDF] [XLS] [CSV]
Standing Orders	List of all standing order titles that are currently active		[PDF] [XLS] [CSV]
Barcodes	Generates barcodes for inventory tracking		[PDF] [XLS]
My Claims			
Active Claims	List of all claims that are not yet resolved		[PDF] [XLS] [CSV]
Resolved Claims	List of all claims that have been updated to resolved		[PDF] [XLS] [CSV]
Claiming Restrictions	List of publisher claiming restrictions for active titles		[PDF] [XLS] [CSV]
Titles			

100% | 7:32 PM 4/1/2013

CoxNet – Reports Tab



Historical Price Analysis

Title	2011	2012	2013
ASCE Journals Package (All 33 Journals) (Online Edition)	\$11,777.00	\$12,228.00	\$12,764.00
Better Homes & Gardens (Print Edition)	\$22.00	\$22.00	\$22.00
Booklist (Print + Online/Password)	\$147.50	\$147.50	\$147.50
Booklist (Print Edition)	\$147.50	\$147.50	\$147.50
Boys Life (Print Edition)	\$24.00	\$24.00	\$24.00
Choice Magazine (Current Reviews for Academic Libraries) (Print Edition)	\$370.00	\$370.00	\$390.00
Cobblestone (Discover American History) (Print Edition)	\$33.95	\$33.95	\$33.95
Consumer Reports (With Buying Guide) (Print Edition)	\$29.00	\$29.00	\$29.00
CQ Weekly Full Service (Print Edition)	\$2,097.50	\$2,099.00	\$2,499.00
Discover (Print Edition)	\$34.95	\$29.95	\$29.95
ESPN Magazine (Print Edition)	\$29.97	\$29.97	\$29.97
Forbes (Print + Online)	\$59.95	\$59.95	\$59.95
International Journal of Remote Sensing (Print + Online)	\$9,999.00	\$10,998.00	\$11,988.00
JAMA (Journal of the American Medical Association) (Print Edition)	\$700.00	\$840.00	\$966.00
Kids Discover (Print Edition)	\$26.95	\$26.95	\$26.95
Library Media Connection (Print Edition)	\$69.00	\$69.00	\$69.00
Library Sparks (Print Edition)	\$59.95	\$59.95	\$59.95
Marine Ecology Progress Series (Print + Online)	\$6,991.10	\$4,577.00	\$4,975.00
Morningstar Mutual Funds (Print + Online)	\$925.00	\$925.00	\$925.00
Nation, The (Print Edition)	\$90.00	\$90.00	\$90.00
Nature (Print Edition)	\$3,575.00	\$3,790.00	\$4,055.00
New England Journal of Medicine (Print Edition)	\$775.00	\$810.00	\$975.00
New Yorker, The (Print Edition)	\$49.95	\$61.95	\$69.95
Popular Science (Print Edition)	\$19.97	\$19.97	\$19.97
Psychological Science Package (Online Edition)	\$3,912.00	\$5,086.00	\$5,594.00
Publishers Weekly (Print + Online)	\$249.99	\$249.99	\$249.99

Ranger Rick (Print Edition)	\$24.00	\$24.00	\$24.00
Readers Digest (Print Edition)	\$24.98	\$24.98	\$24.98
Royal Society of Chemistry: Core Chemistry Collection (Online Edition)	\$26,532.00	\$28,124.00	\$28,124.00
School Library Monthly (Print Edition)	\$55.00	\$55.00	\$55.00
Smithsonian Magazine (Print Edition)	\$38.00	\$38.00	\$38.00
Time Magazine (Print + Online)	\$76.13	\$76.13	\$76.13
US Weekly	\$125.00	\$125.00	\$125.00
Voice of Youth Advocates (VOYA)	\$57.00	\$57.00	\$62.00
Wall Street Journal (Mail) (Print Edition)	\$395.00	\$395.00	\$413.40
Zoobooks (Print Edition)	\$25.95	\$25.95	\$25.95



Active Claims

Title	Received	Issue	Claim	Reason
American Family Physician (Limited Access)	05/03/13	05/03/13	5897157	<i>Damaged Issue (Please Replace)</i>
Deaf Life	04/09/13	04/09/13	5890561	<i>Duplicates Received</i>
Futurist	02/27/14	03/01/14	5969439	<i>Missing Items</i>
Horn Book Magazine	04/23/13	05/01/13	5894653	<i>Duplicates Received</i>
MIT Technology Review	05/02/13	03/01/13	5896978	<i>Duplicates Received</i>
New York Folklore Society Membership	03/01/13	03/01/13	5879392	<i>Missing Items</i>
Nutrition Today	05/07/13	05/07/13	5898328	<i>Duplicates Received</i>
People Weekly (Time Inc)	03/26/13	03/26/13	5886828	<i>Missing Items</i>
	08/08/13	03/26/13	5923199	<i>Incorrect Quantity</i>
Poetry	04/15/13	04/15/13	5892112	<i>Duplicates Received</i>
Reason Magazine	04/29/13	06/03/13	5895957	<i>Duplicates Received</i>
Sight & Sound: The International Film Monthly	04/15/13	04/15/13	5892120	<i>Duplicates Received</i>
	05/07/13	04/01/13	5898201	<i>Duplicates Received</i>
	05/17/13	05/17/13	5900594	<i>Duplicates Received</i>
This Week From Indian Country Today	07/17/13		5916423	<i>Cancellation</i>
Wall Street Journal	03/26/13	03/26/13	5886848	<i>Other</i>
	03/26/13	03/26/13	5886851	<i>Other</i>
	04/18/13	03/26/13	5893857	<i>Other</i>

Outstanding 18

Titles Claimed 13

02/27/14

SAMPLE ELECTRONIC ACCESS REPORT

Title ID	Title Name	ISSN	Publisher Name	Title URL	Access Point	Online Access Instructions
1734332	Library Journal (Print + Online + Email)	0363-0277	Media Source Inc	http://www.libraryjournal.com/	http://www.libraryjournal.com/csp/cms/sites/LJ/LJPrint/Archive/index.asp	Online access requires first-time online subscribers to register at http://www.libraryjournal.com/ . Click on "Register" and then click on "Current Magazine Subscriber". Subscriber will need to provide the subscription number located on the magazine mailing label, zip code, and email address. A username and password will need to be created. Renewal subscribers do not need to reactivate their journal subscription, online access will continue uninterrupted. Online access assistance is available by calling Customer Service at 800-588-1030.
1764053	School Library Journal (Print + Online)	0362-8930	Media Source Inc	http://www.schoollibraryjournal.com/	http://www.schoollibraryjournal.com/archive/	Online access requires first-time online subscribers to register at http://www.schoollibraryjournal.com/ by clicking on "Register" and then on "Current Magazine Subscriber". Subscriber will need to provide their account number located on the magazine mailing label, email address, and zip code. A username and password will need to be created. Renewal subscribers do not need to reactivate their journal subscription, online access will continue uninterrupted. Online access assistance is available by calling 800-595-1066 or by emailing sjcustserv@cds-global.com .

Supplement	Print	Status	Active	Discontinued	7/25/2013
Supplement	Print	Publisher	CURTCO/AA LLC	Art & Antiques World Wide Media	7/25/2013
Home Theater	Print	Name	Home Theater	Sound & Vision	7/24/2013
PC World	Print	Status	Must Order Direct	Ceased	7/22/2013
Jet	Print	Issues	26	20	7/17/2013
MacLife (Mac Life) (Non-Disc Version)	Print	Status	Must Order Direct	Active	7/15/2013
PC Gamer (Non-Disc Version)	Print	Status	Must Order Direct	Active	7/15/2013
New Car Buying Guide (Consumer Reports)	Print	Status	Active	Discontinued	7/11/2013
Home Theater	Print	Status	Active	Must Order Direct	7/2/2013
Snowboarder Magazine	Print	Frequency	Irregular	Bi-Monthly	7/2/2013
Snowboarder Magazine	Print	Issues	7	6	7/2/2013
Cricut	Print	Status	Active	Discontinued	6/27/2013
UN Chronicle (English Edition)	Print	Delayed			6/11/2013
Autism File	Print	Status	Active	Discontinued	6/3/2013
Occupational Outlook Quarterly	Print + Online	Status	Active	Discontinued	5/29/2013
Wall Street Journal	Print	Name	Wall Street Journal	Wall Street Journal	5/24/2013
Christianity Today	Print + Digital	Issues			5/21/2013
Parenting Magazine	Print	Status	Active	Ceased	5/15/2013
Parenting School Years	Print	Status	Active	Ceased	5/15/2013
Business	Print	Status	Active	Discontinued	5/14/2013
Adoptive Families Magazine	Print + Digital	Media Type	Print	Print + Digital	5/8/2013
ADDitude Magazine	Print + Digital	Media Type	Print	Print + Digital	5/7/2013
Worth	Print	Status	Must Order Direct	Active	5/1/2013
Art & Antiques	Print + Online	Name	Art & Antiques (Print Edition)	Art & Antiques (Print + Online)	4/26/2013
Art & Antiques	Print + Online	Media Type	Print	Print + Online	4/26/2013
Readers Digest	Print	Other			4/17/2013
Soccer 360	Print	Name	Soccer Three-Sixty (Print Edition)	Soccer 360 (Print Edition)	4/11/2013
Black Belt	Print	Frequency	Monthly	Bi-Monthly	4/9/2013
MIT Technology Review	Print	Status	Active	Awaiting Pub Response	4/9/2013
MIT Technology Review	Print	Status	Awaiting Pub Response	Active	4/9/2013
Preservation)	Print	Status	Active	Discontinued	4/4/2013
Forum Journal	Digital	New Title		Forum Journal (Digital)	4/4/2013
New Republic	Print + Online	Frequency	Irregular	Bi-Weekly	4/3/2013
New Republic	Print + Online	Issues	20	23	4/3/2013
Batman: Li'l Gotham	Print	New Title		Batman: Li'l Gotham (Print Edition)	4/1/2013
W Magazine	Print	Issues	12	10	3/26/2013
Ladies Home Journal	Print	Issues	11	10	3/26/2013
American Legacy	Print	Delayed			3/21/2013

PC World	Print	Status	Active	Must Order Direct	3/20/2013
American Heritage	Print	Status	Active	Suspended	3/20/2013
Current Science (Teacher Edition)	Print	Status	Active	Must Order Direct	3/18/2013
Upscale: Successful Black Magazine	Print	Status	Suspended	Active	3/12/2013
Harvard Business Review	Premium Access	Issues	10	12	3/8/2013
Sheet Music Magazine	Print	Status	Suspended	Ceased	3/6/2013
Parenting Early Years	Print	Name	Parenting Early Years (Print Edition)	Parenting Magazine (Print Edition)	3/4/2013
Industry Week	Print + Online	Status	Active	Discontinued	3/1/2013
for Real People	Online	Name	People (Print Edition)	(Online Edition)	2/22/2013
for Real People	Online	Media Type	Print	Online	2/22/2013
Cricut	Print	Frequency	Bi-Monthly	Monthly	2/12/2013
Cricut	Print	Issues	6	12	2/12/2013
Creative Steps	Print + Online	Name	Creative Steps (Print + Online)	Creative Steps (Print Edition)	2/12/2013
Creative Steps	Print	New Title		Creative Steps (Print Edition)	2/12/2013
Garden Design	Print	Status	Active	Ceased	2/11/2013
Crafts n Things	Print	Frequency	Bi-Monthly	Quarterly	2/8/2013
Crafts n Things	Print	Issues	6	4	2/8/2013
American Heritage	Print	Delayed			2/7/2013
Black Belt	Print	Issues	10	6	2/6/2013
Lifestyle	Print + Digital	Media Type	Print	Print + Digital	2/6/2013
Harvard Business Review	Print	Status	Discontinued	Inactive	1/29/2013
Ms Magazine	Print	Issues			1/28/2013
EQUUS Magazine	Print	Publisher	Source Interlink Media	Active Interest Media	1/25/2013
Superman	Print	Name	Superman (Print Edition)	Superman (The New 52)	1/9/2013
Harvard Business Review	Premium Access	Status	Inactive	Active	12/27/2012
Current Science (Weekly Reader)	Print + Online	Status	Active	Must Order Direct	12/19/2012
Preschool Friends	Print	Frequency	Irregular	Bi-Monthly	12/14/2012
Preschool Friends	Print	Issues	8	6	12/14/2012
Review, The	Print	Delayed			12/14/2012
Everyday Food (Martha Stewart)	Print	Status	Active	Discontinued	12/10/2012
Whole Living Magazine	Print	Status	Active	Ceased	12/10/2012
Forbes	Print + Online	Frequency	Bi-Weekly	Bi-Monthly	12/7/2012
Forbes	Print + Online	Issues	26	24	12/7/2012
Advocate	Print + Online	Frequency	Monthly	Bi-Monthly	12/6/2012
Advocate	Print + Online	Issues	12	6	12/6/2012

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AVG Search Safe Do Not Track Facebook Performance

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Customer Invoices Customer Payments Customer Refunds Aged Invoices Organization Issues Statements Credit Memo Summary Org Statements Reports

1614525 Search Reset

Search By: Organization Payment Type All

From To

[Switch To Print Mode]

Payment #	Dep Date	Type	Reference	Customer	Customer ID	Org	Org ID	Parent Org	CSR	State	Credited Title	Reason	Entered By	Comment	Amount	Remain
1568156	6/3/13	WIRE_TRANSFER	101038158006170			DEPT OF VETERANS AFFAIRS	1614525	1614525	dhopkins				jhan@wtcox.com		\$29,159.92	\$0.00
1569086	5/30/13	CREDIT_CARD		VA Northern California Health Care System	2077968	DEPT OF VETERANS AFFAIRS	1614525	1614525	dhopkins	CA			jhan@wtcox.com	pp	\$229.06	\$229.06
1568990	5/28/13	WIRE_TRANSFER	101038158634136			DEPT OF VETERANS AFFAIRS	1614525	1614525	dhopkins				jhan@wtcox.com		\$13,095.45	\$0.00
1568866	5/22/13	CREDIT_MEMO	1568866	VA SALT LAKE CITY HEALTH CARE SYSTEM	2055854	DEPT OF VETERANS AFFAIRS	1614525	1614525	dhopkins	UT	AACR Journal Suite (Print + Online/ Single User)	Cancelled Title	jhan@wtcox.com		\$2,413.42	\$2,413.42
1568828	5/21/13	WIRE_TRANSFER	101038158483061			DEPT OF VETERANS AFFAIRS	1614525	1614525	dhopkins				jhan@wtcox.com		\$42,485.31	\$947.06
1568686	5/17/13	WIRE_TRANSFER	101038158412162	El Paso VA Health Care System	2087307	DEPT OF VETERANS AFFAIRS	1614525	1614525	dhopkins	TX			jhan@wtcox.com		\$13,800.83	\$0.00

Windows Taskbar: 3:58 PM 6/4/2013

PAYMENT STATEMENT

Statement of Account



Information Services
 201 Village Road
 Shallotte, NC 28470
 Phone: 1-800-571-9554
 Fax: 910-755-6274
 Email: jpurvis@wtcox.com
 FED ID: 56-1352557
 DUNS: 084174804

Organization	1618939
Statement Date	01/31/13

All unpaid invoices dated up to and including January 31, 2013 have been listed on this statement. Payments made after this date will be applied on subsequent statements.

Account 2066202 Rice University

Date	Invoice	PO	Payment Reference	Inv Amount	Applied	Balance Due
12/24/11	2923588	NON DEPOSIT 2012/HIS-		\$ 340.06	\$ 0.00	\$ 340.06
12/24/11	2923587	NON DEPOSIT 2012/HIS-		\$ 602.09	\$ 0.00	\$ 602.09
12/24/11	2923594	NON DEPOSIT 2012/PHY-		\$ 220.50	\$ 0.00	\$ 220.50
12/24/11	2923592	NON DEPOSIT 2012/PHI-		\$ 229.27	\$ 0.00	\$ 229.27
12/24/11	2923595	NON DEPOSIT 2012/REL-		\$ 294.98	\$ 0.00	\$ 294.98
12/29/11	2923789	NON DEPOSIT 2012/BCH-		\$ 144.06	\$ 0.00	\$ 144.06
12/29/11	2923791	NON DEPOSIT 2012/MAT-		\$ 403.71	\$ 0.00	\$ 403.71
02/14/12	2925004	NON DEPOSIT 2012/FRE-		\$ 203.58	\$ 0.00	\$ 203.58
12/18/12	2945675	NON DEPOSIT		\$ 900.89	\$ 0.00	\$ 900.89
12/31/12	2946209	Wiley Deposit (A-Jrnl of M)		\$ 259,502.76	\$ 153,739.67	\$ 105,763.09
01/07/13			Check 1035867		\$ 153,739.67	

Current	30 - 60 Days	61 - 90 Days	Over 90 Days	Total Balance Due
\$ 0.00	\$ 106,663.98	\$ 0.00	\$ 2,438.25	\$ 109,102.23

Outstanding balances over 30 days will be subject to a 1% finance charge. Please pay promptly to avoid such charges.

Invoices from Jan 2010 can be viewed in our web based system CoxNet

PREPARED FOR:

MEMBERSHIPS with TITLES

Title	Media	Languages	Frequency	Title ID	Status	ISSN	ISSN-E	Publisher
American Alliance for Health Physical Education Recreation & Dance Membership	Membership	English	Annual	1668752	Active			AAHPERD
Update (AAHPERD)	Print	English	Bi-Monthly	1777093	Active	0273-8023		AAHPERD
Children's Literature Council of Southern California Membership	Membership	English	Annual	2073666	Active			Children's Literature Council of Southern California
Sampler, The	Print	English	Irregular	2073666	Active			Children's Literature Council of Southern California
Eastern States Archaeological Federation Membership	Membership	English	Annual	1698058	Active			ESAF
Archaeology of Eastern North America	Print	English	Annual	1672333	Active	0360-1021		ESAF
Eastern States Archaeological Federation Bulletin	Print	English	Annual	1698057	Active			ESAF
Friends of the National Zoo National Membership	Membership	English	Annual	1706884	Active			Friends of the National Zoo
Pawprints	Print	English	Bi-Monthly	1751924	Active			Friends of the National Zoo
Zoogear	Print	English	Bi-Monthly	1783998	Active	0163-416X		Friends of the National Zoo
Fulton County Genealogical Society Membership	Membership	English	Annual	1707201	Active			Fulton County Genealogical Society
Fulton Hickman Genealogical Journal	Print	English	Semi-Annually	1707212	Active	1065-0164		Fulton County Genealogical Society
Furniture History Society Membership	Membership	English	Annual	1707337	Active			Furniture History Society
Furniture History	Print	English	Annual	1707336	Active	0016-3058		Furniture History Society
Hart County Historical Society Membership	Membership	English	Annual	1711246	Active			Hart County Historical Society
Hart County Historical Society Quarterly	Print	English	Quarterly	1711247	Active			Hart County Historical Society
Heraldry Society Membership with Coat of Arms	Membership	English	Annual	2074256	Active			HERALDRY SOCIETY
Coat of Arms	Print	English	Semi-Annually	1688271	Active	0010-003X		HERALDRY SOCIETY
Heraldry Gazette	Print	English	Quarterly	2074257	Active			HERALDRY SOCIETY
Huntington Library, Art Collections, and Botanical Gardens Membership	Membership	English	Annual	2073660	Active			Huntington Library, Art Collections, and Botanical Gardens
Calendar: Huntington Library, Art Collections, and Botanical Gardens	Print	English	Bi-Monthly	2073638	Active			Huntington Library, Art Collections, and Botanical Gardens
Huntington Frontiers	Print	English	Semi-Annually	2073659	Active			Huntington Library, Art Collections, and Botanical Gardens
Huntington Library, Art Collections, and Botanical Gardens Newsletter	Print	English	Bi-Monthly	2073658	Active			Huntington Library, Art Collections, and Botanical Gardens
eHuntington News	Email	English	Monthly	2073657	Active			Huntington Library, Art Collections, and Botanical Gardens
International Municipal Lawyers Association	Membership	English	Annual	1719919	Active			IMLA
IMLA Model Ordinance Service	Print	English	Irregular	1715702	Active			IMLA
Municipal Lawyer Magazine	Print	English	Bi-Monthly	1742477	Active			IMLA
Journal of Medical Internet Research Institutional Membership	Membership	English	Annual	1726577	Active			JMIR Publications Inc.
Journal of Medical Internet Research	Online	English	Quarterly	1726576	Active	1438-8871		JMIR Publications Inc.
Malone Society Membership	Membership	English	Annual	1736449	Active			Malone Society
Annual Report: Malone Society	Print	English	Annual	1671254	Active			Malone Society
Annual Volume: Malone Society	Print	English	Annual	1671440	Active			Malone Society
Percussive Arts Society Membership	Membership	English	Annual	1752551	Active			Percussive Arts Society
Percussion News	Print	English	Bi-Monthly	1752550	Active	1534-9764		Percussive Arts Society
Percussive Notes	Print	English	Bi-Monthly	1752552	Active	0553-6502		Percussive Arts Society
SEAMUS Institutional Membership	Membership	English	Annual	2059088	Active			Society for Electro-Acoustic Music in the United States (SEAMUS)
Journal SEAMUS	Print	English	Semi-Annually	2060716	Active	0897-6473		Society for Electro-Acoustic Music in the United States (SEAMUS)
SEAMUS Newsletter	Print	English	Irregular	2060717	Active			Society for Electro-Acoustic Music in the United States (SEAMUS)
SEAMUS CD Series	CD-Rom	English	Annual	2060718	Active			Society for Electro-Acoustic Music in the United States (SEAMUS)
Wolfe Pack Membership	Membership	English	Annual	2067037	Active			Wolfe Pack
Wolfe Pack Gazette	Print	English	Semi-Annually	1781787	Active			Wolfe Pack



TITLE and SUBJECT LIST

TITLE_ID	NAME	SUBJECT
1667608	Air & Space (Print Edition)	Aeronautics & Aviation
1665465	Acres USA (Print Edition)	Agriculture & Horticulture
1665074	Acadiana Profile (Print Edition)	American Scene/Regional
1669993	American Quarter Horse Journal (Print Edition)	Animals & Pets
1668365	Ally the Science Sleuth Investigates Paleontology: Dinosaurs, Fossils & the Ice Age! (Paperback)	Anthropology & Archaeology
1671600	Antique Trader (Print Edition)	Antiques & Collectibles
1664897	Abitare (Print Edition)	Architecture, Building & Construction
1666921	African American Career World (Print Edition)	Area Studies
1667649	Air Force Times (Print + Online)	Armed Forces
2057332	3D Artist (Print Edition)	Art
1674336	Astronomy Magazine (Print Edition)	Astronomy
1664469	4 Wheel & Off-Road (Print Edition)	Automobile & Motorcross
1664803	ABA Banking Journal (Print Edition)	Business, Labor & Economics
1685889	Chief: Civil Service Leader, The (Print Edition)	Career Resources
2066706	Adventure Box (Print + CD-Rom)	Child Growth & Development
1665869	Action Comics (Print Edition)	Comics
1666025	Adbusters: Journal of the Mental Environment (Print Edition)	Communications, Journalism & Writing
1664315	.Net (Print Edition)	Computers & Computer Science
1690834	Consumer Reports (With Buying Guide) (Print Edition)	Consumer Education
1668247	All About Beer (Print Edition)	Cuisine & Food
2058220	Alma Magazine (Print Edition)	Current Events
1688170	CMYK Magazine (Print Edition)	Design
1669068	American Craft (Print Edition)	Drama, Theatre & Performing Arts
1676489	Bay Nature (Print Edition)	Ecology & Environment
1665006	Academe: Bulletin of the AAUP (Print Edition)	Education

1699507 Electronic Design (Print Edition)
1673694 ASHRAE Journal (Print Edition)
1667829 Akhbar e Jehan (Print Edition)
1678859 Black Scholar, The (Print Edition)
1678764 Black College Today (Print Edition)
1666192 Adoptive Families Magazine (Print Edition)
1668363 Allure (Print Edition)
1669014 American Cinematographer (Print + Digital)
1667412 Ahora (Teacher Edition) (Scholastic) (Print Edition)
1666092 Adirondack Life (Print Edition)
1664354 15 a 20 (Print Edition)
2056304 AFAR Magazine (Print Edition)
2055768 .de (German Edition) (Print Edition)
1669901 American Patchwork & Quilting (Print Edition)
1665494 ACSMS Health & Fitness Journal (Print Edition)
1763034 Safety & Health (Print Edition)
1664927 About Time (Print Edition)
1670266 American Woodworker (Print Edition)
1674481 Atlanta Homes & Lifestyles (Print Edition)
1696006 Diesel Progress North American Edition (Print Edition)
1664810 ABA Journal (American Bar Association) (Print Edition)
1666334 Advanced Technology Libraries (Print Edition)
1664943 Abridged Readers Guide to Periodical Literature (HW Wilson) (Print Edition)
1664678 AACN Advanced Critical Care (Print Edition)
1664952 Absolute Sound, The (Print Edition)
1742931 Mystery Scene (Print Edition)
1673803 Asian Affairs: An American Review (Print + Online)
1666088 Adirondack Explorer (Print Edition)
1667060 Afro American (Baltimore Edition) (Print Edition)
1666312 Advanced Photoshop (Print + CD-ROM)
1694582 Deaf Life (Print Edition)
1666055 ADDitude Magazine (Print Edition)
1667909 Al Jumuah (Print + Digital)
2058512 Math & Science Word Puzzles (Print Edition)
1668916 American Biology Teacher (Print + Online)
1670466 Analog Science Fiction & Fact (Print Edition)
2060066 American Sociological Review (Print Edition)

Electronics
Engineering
Entertainment
Ethics
Ethnic
Family Life
Fashion, Style and Grooming
Film & Television
Foreign Language
Gardens
General Interest
Geography & Travel
Government Political Science
Handicrafts
Health
Health & Safety
History
Hobbies
House & Home
Industrial & Mechanical Arts
Law & Legal Matters
Library Aids
Literature
Medical
Music
Mysteries
National & World Affairs
Nature & Outdoor Life
Newspaper
Photography
Physically Impaired
Psychology
Religion
School Activities
Science
Science Fiction
Social Issues

1665965 Ad Astra (Print + Online)
1668428 Alpinist Magazine (Print Edition)
1676949 Bell Labs Technical Journal (Print Edition)
1668014 ALAN Review (Print Edition)
1669969 American Printer (Print + Online)
1675626 Azizah (Print Edition)
1666562 Adventure Box (Print Edition)

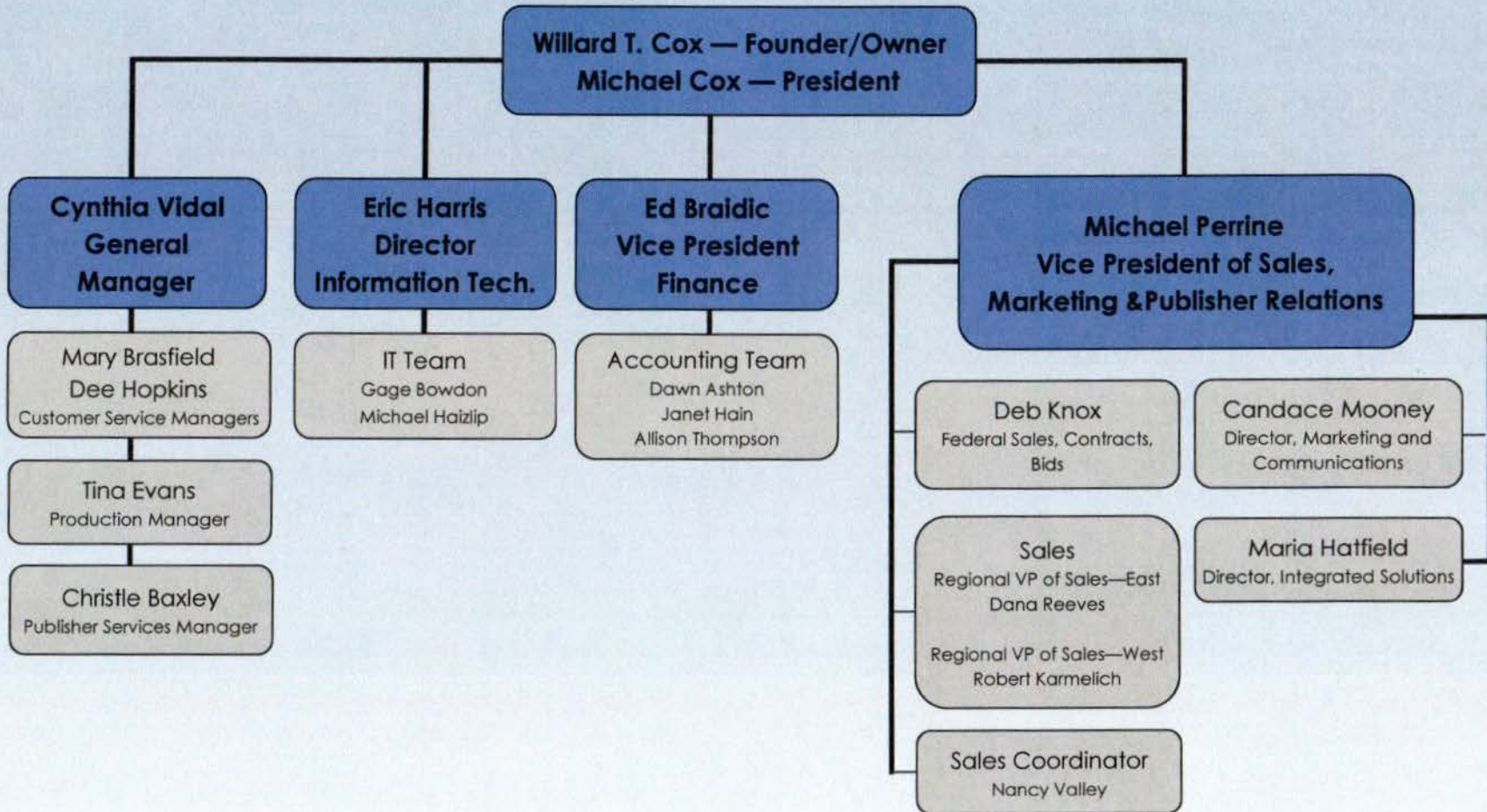
Space
Sports & Recreation
Technology
Teen
Vocational Education
Women
Youth



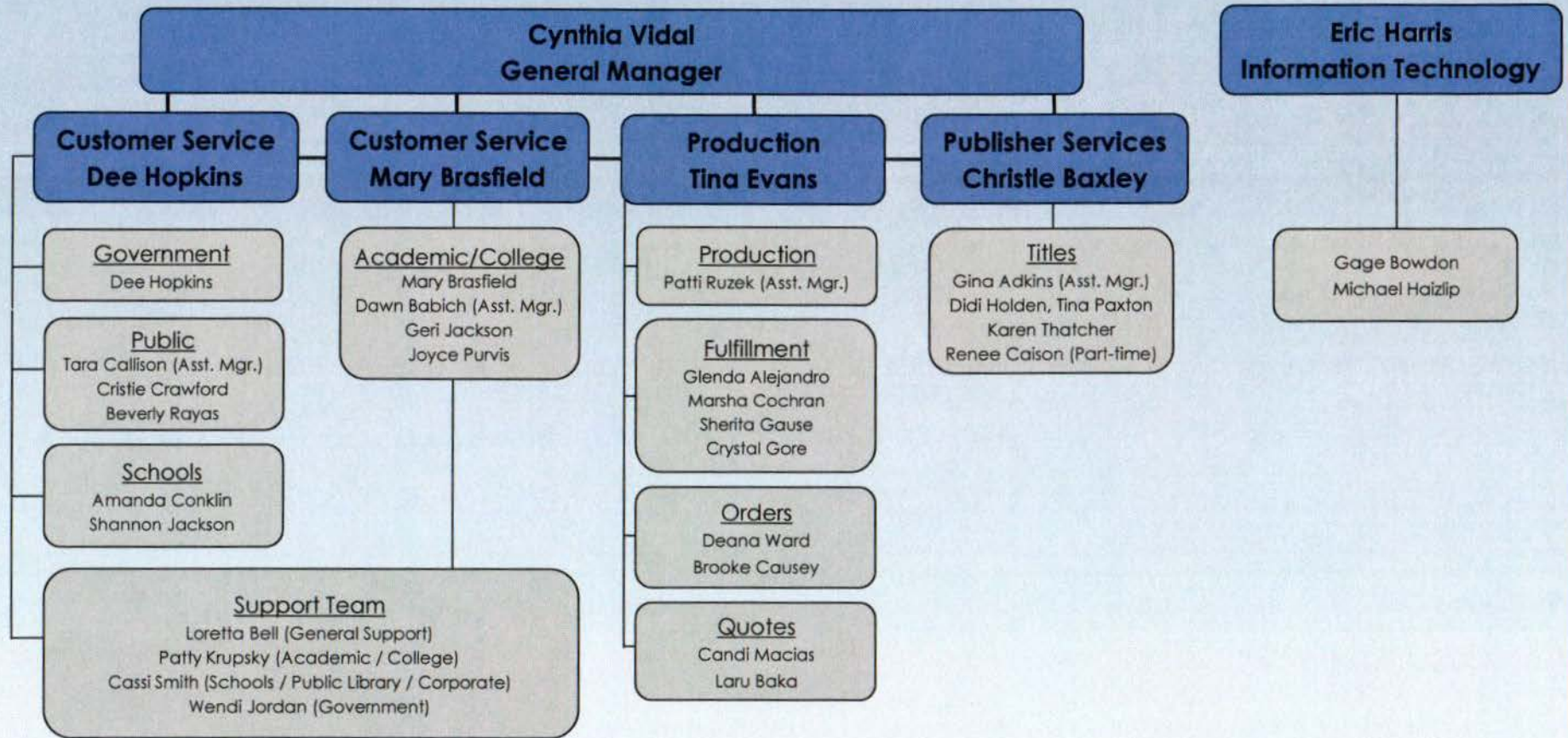
Organizational Chart

Contact:
Debra M. Knox
Director of Contract Administration
Small Business
201 Village Road
Shallotte, NC 28470
800-571-9554, Ext. 215
dknox@wtcox.com

WT COX INFORMATION SERVICES ORGANIZATIONAL FLOW CHART

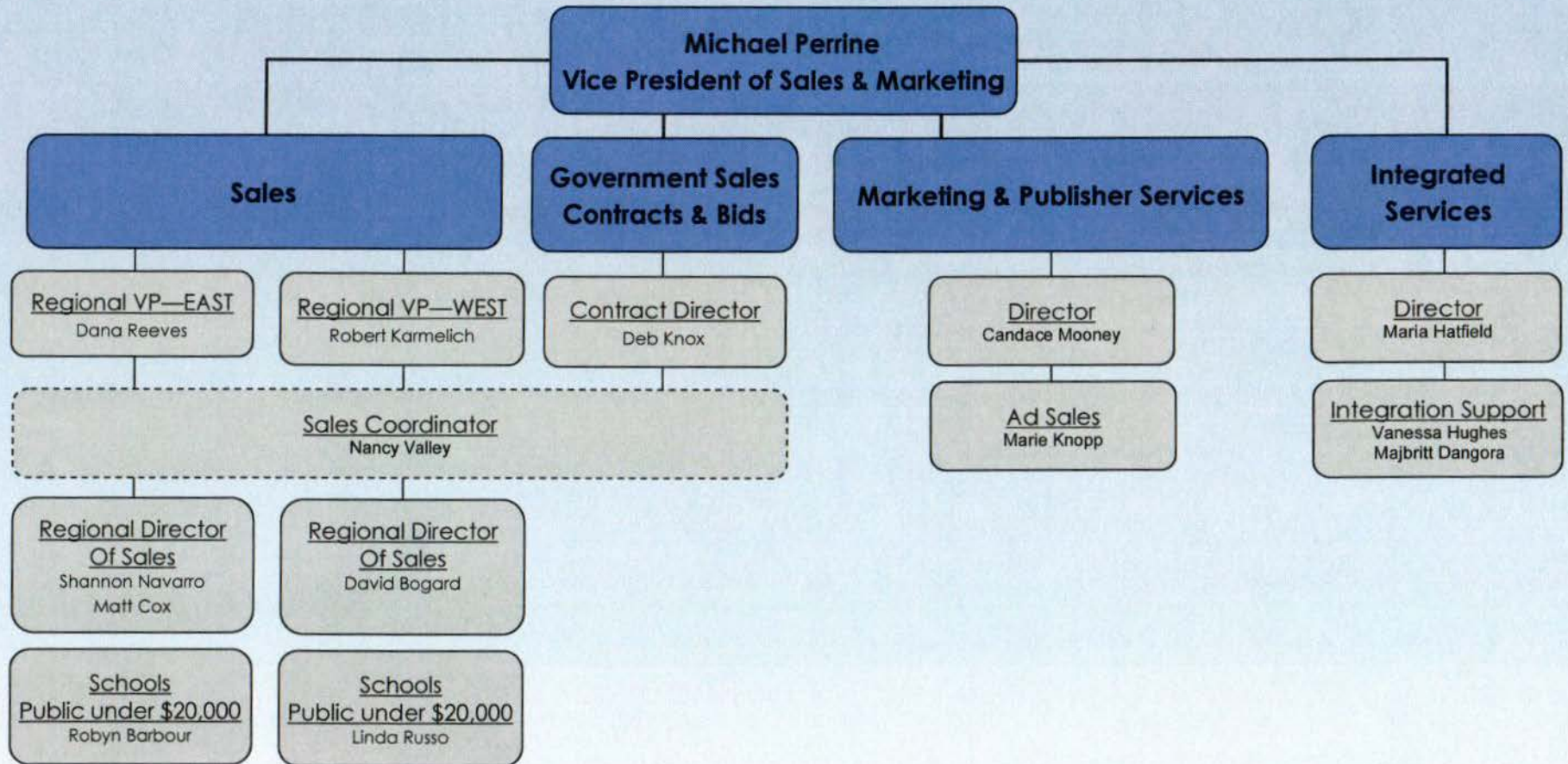


WT COX INFORMATION SERVICES ORGANIZATIONAL FLOW CHART—OPERATIONS



Customer Service: 14
 Production: 10
 Titles: 5
 Information Technology: 3
 General Management: 1
TOTAL: 33

WT COX INFORMATION SERVICES ORGANIZATIONAL FLOW CHART—SALES & MARKETING



Sales / Support: 9
 Government / Bids: 1
 Marketing: 2
 Publisher Services: 1
 Integrated Services: 3
 Management: 1
TOTAL: 17

Attachment 1
WT Cox Information Services

1. **Virginia Tech Question:**

How are the VASCUPP member institutions' prepayments segregated from the contractor's operating cash balances and other clients' prepayments? Please describe in detail.

Contractor Answer:

WT Cox Information Services can set aside a separate account for prepayments as requested and has done so in the past when required, however, doing this will not permit you to take advantage of any of the offered prepayment discounts. Our prepayment accounts are maintained separately from our general ledger accounts.

2. **Virginia Tech Question:**

Does the segregation of funds create a legal structure to allow for VASCUPP member institutions to get their prepayments back in the unlikely event of the contractor's bankruptcy? Please describe in detail.

Contractor Answer:

If a prepayment occurs and segregation of funds is the outcome of the final negotiations, a legal structure to allow return of prepayments will also be included in the arrangements. The likelihood of bankruptcy is minimal. Orders are placed promptly after receipt of renewal. WT Cox Information Services prepays all orders to guarantee delivery in a timely fashion.

3. **Virginia Tech Question:**

Please list all pending litigation claims against the contractor.

Contractor Answer:

WT Cox Information Services has never defaulted on a contract nor been denied a bond due to irresponsibility of business practices or failure to perform satisfactorily. We have never filed for bankruptcy nor been in default of a loan. There has not been any past nor is there pending litigation claims filed against the company. We are not in merger or acquisition talks. We have no outside investment firms and are completely based in the United States.

4. **Virginia Tech Question:**

Once the contractor receives the renewal list with the authorization to process renewals, how quickly does the contractor prepay all orders?

Contractor Answer:

All orders are prepaid and funds are obligated at appropriate time to ensure continuous service and/or delivery based on Library expiration dates. In general, orders are released within 7 to 10 days from renewal list receipt.

5. **Virginia Tech Question:**
Describe how the contractor provides monthly status reports of loss of access claims for e-resources.

Contractor Answer:

Monthly status reports are available via CoxNet, our online management system on demand. As desired, a schedule of deliverables shall be established during transition phase of contract award if alternate delivery of information is desired. Advise transition team of requirements.

6. **Virginia Tech Question:**
Describe how does the contractor report changes in packages such as titles transferring in and out of packages and provider platform changes.

Contractor Answer:

URL changes and registration information changes are tracked in the electronic resource details of CoxNet as they occur. Titles transferring in and out of packages as well as platform changes are tracked via our internal Quality Control reporting and can be provided as a customized, no charge report on demand or on a regular schedule as desired. Your customer service representative can be contacted to request reports on demand. Scheduled reports will be put into place during the transition phase of contract award.

7. **Virginia Tech Question:**
Can the contractor distinguish between firm-priced billing from the publisher and estimated billing on invoices? Please provide details.

Contractor Answer:

Yes we are able to identify current pricing (to be held firm at time of invoice) versus estimated pricing. The invoice shall indicate the difference by line item designation (symbol based on compatibility with ILS, i.e., asterisk).

8. **Virginia Tech Question:**
As the intent of this solicitation is to leverage the combined volume of VASCUPP member institutions, please detail the most competitive service charge rate the contractor can provide.

Contractor Answer:

WT Cox Information Services offers a 1.75% service charge in the base year of the contract. Subsequent contract years offer a reduction to 1.5% service charge which is held firm for the duration of the contract. Additionally, if the entire consortia utilizes our services, an additional .25% service charge reduction is offered. Additionally, we do offer a prepayment discount to further reduce cost to University(ies).

9. **Virginia Tech Question:**
Will the contractor give a discount for payment being made in net 15 days?

Contractor Answer:

WT Cox Information Services does not offer a net 15 day discount.

10. **Virginia Tech Question:**

Will the contractor commit to providing billing pricing corrections to VASCUPP member institutions within the subscription year and no later? (Meaning a pricing correction must be completed by the twelfth (12th) or last month of the subscription cycle.)

Contractor Answer:

Yes, WT Cox Information Services will commit to correcting billing differences within the current subscription cycle, i.e., within twelve months.

11. **Virginia Tech Question:**

For eVA Registered Businesses That Are NOT a DSBSD certified small business, the current eVA fees are 1%, Capped At \$1,500 per Purchase Order (capped at \$500 for DSBSD certified businesses). The expectation is that a single blanket PO would be issued at the start of the contract and the EVA fee would be applicable only once for the duration of the agreement however this may differ among VASCUPP member institutions. How does the contractor propose to handle the eVA fee? Please describe in detail.

Contractor Answer:

WT Cox Information Services has eVA billing in place and pays invoices issued by eVA as they come due.

12. **Virginia Tech Question:**

As the intent of this solicitation is to leverage the combined volume of VASCUPP member institutions, does the contractor consider this potential contract an opportunity to grow business with an inclusive and expanding group of Virginia institutions and agencies rather than only providing services and pricing based on an individual institution? Please describe in detail.

Contractor Answer:

WT Cox Information Services considers the VASCUPP contract a welcome opportunity to expand opportunities within Virginia institutions and agencies. Our intent is to leverage the economical service charge offering to provide Virginia institutions and agencies with best value over the term of the contract. WT Cox Information Services prides ourselves on the value we provide to libraries and the level of service given as well as the ability to save your library money.

The minimal service charge offered shall be fixed and designated as percentage on publisher's current list price. The offer shall remain firm for life of contract and shall be firm without conditions, qualifications, or caveats.

13. **Virginia Tech Question:**

As the intent of this solicitation is to leverage the combined volume of VASCUPP member institutions, describe any special rates or pricing the contractor can offer in a multi-year, multi-institution, consortial contract.

Contractor Answer:

WT Cox Information Services offers a 1.75% service charge in the base year of the contract. Subsequent contract years offer a reduction to 1.5% service charge which is held firm for the duration of the contract. Additionally, if the entire consortia utilizes our services, an additional .25% service charge reduction is offered. Additionally, we do offer a prepayment discount to further reduce cost to University(ies).

Our prepayment discount is as follows:

<i>Before June 30th</i>	<i>1.0% discount</i>
<i>Before July 31st</i>	<i>.8% discount</i>
<i>Before August 31st</i>	<i>.6% discount</i>
<i>Before September 30th</i>	<i>.4% discount</i>
<i>Before October 31st</i>	<i>.25% discount</i>

Prepayment or payment by check or wire transfer is required to take advantage of prepayment discount and is the preferred method of payment for this account.

14. **Virginia Tech Question:**

What level of title fee discount or waiver does the contractor offer in a multi-year, multi-institution, consortial contract such as this is intended to be?

Contractor Answer:

WT Cox Information Services offers a 1.75% service charge in the base year of the contract. Subsequent contract years offer a reduction to 1.5% service charge which is held firm for the duration of the contract. Additionally, if the entire consortia utilizes our services, an additional .25% service charge reduction is offered. Additionally, we do offer a prepayment discount to further reduce cost to University(ies).

15. **Virginia Tech Question:**

Describe what price-related or service-related inducements the contractor can offer in a multi-year, multi-institution, consortial contract.

Contractor Answer:

WT Cox Information Services offers an additional .25% reduction for multi-year, multi-institution, consortial contracts.

16. **Virginia Tech Question:**

Describe what terms and/or discounts are applicable for one-line invoice payments, prepayments, deposit accounts, and other payment options that the contractor can offer in a multi-year, multi-institution, consortial contract.

Contractor Answer:

WT Cox Information Services offers a 1.75% service charge in the base year of the contract. Subsequent contract years offer a reduction to 1.5% service charge which is held firm for the duration of the contract. Additionally, if the entire consortia utilizes our services, an additional .25% service charge reduction is offered. Additionally, we do offer a prepayment discount to further reduce cost to University(ies).

Our prepayment discount is as follows:

<i>Before June 30th</i>	<i>1.0% discount</i>
<i>Before July 31st</i>	<i>.8% discount</i>
<i>Before August 31st</i>	<i>.6% discount</i>
<i>Before September 30th</i>	<i>.4% discount</i>
<i>Before October 31st</i>	<i>.25% discount</i>

Prepayment or payment by check or wire transfer is required to take advantage of repayment discount and is the preferred method of payment for this account.

17. **Virginia Tech Question:**

Does the contractor agree to keep the service charge firm regardless of the total spend among VASCUPP member institutions throughout the life of the contract?

Contractor Answer:

WT Cox Information Services agrees to hold service charge firm based on our offer detailed herein for life of contract.

18. **Virginia Tech Question:**

Does the contractor agree to waive or reduce the fee for peripheral and auxiliary services such as a usage statistics-gathering module?

Contractor Answer:

WT Cox Information Services agrees to offer reduced fees for peripheral and auxiliary services for a consortial contract. Pricing would be tiered based on number of platforms for usage statistics generator peripherals.

19. **Virginia Tech Question:**

Does the contractor agree to provide a regular or automated report of titles that have moved from a print to an online or print+online format?

Contractor Answer:

WT Cox Information Services shall provide a regularly scheduled report of titles that have changed media, i.e., print to online or print plus online format. Our online management system provides a title notification feature and a report can be generated based on your data parameters and schedule.

20. **Virginia Tech Question:**

Does the contractor agree to provide a regular or automated report of add-on net title fees and the titles and/or publishers associated with the add-on net title fee?

Contractor Answer:

WT Cox Information Services shall provide a regularly scheduled report of add-on net title fees on demand. The report shall include add-on net title fees, titles and publishers associated with fees. A regularly scheduled report can be provided and shall be discussed during transition phase of contract award. A custom report can be generated based on your data parameters and schedule. Net title fees are not added to custom University pricing, i.e., special package deals or databases.

21. **Virginia Tech Question:**

Are title coverage years included in the contractor's online catalog and subscription management database?

Contractor Answer:

Coxnet, our online data management system, allows view of permanent archival access, perpetual rights information, and coverage data for all titles regardless of source. This view is available at the publisher, title and rate level within your collection.

22. **Virginia Tech Question:**

Price has become a significant factor in determining how we proceed. With this in mind, please reconsider and provide the best pricing or discounts possible for all services offered.

Contractor Answer:

WT Cox Information Services offers a 1.75% service charge in the base year of the contract. Subsequent contract years offer a reduction to 1.5% service charge which is held firm for the duration of the contract. Additionally, if the entire consortia utilizes our services, an additional .25% service charge reduction is offered. Additionally, we do offer a prepayment discount to further reduce cost to University(ies). We shall agree to absorb eVA fees as well.

23. **Virginia Tech Question:**

Does your company agree to provide appropriate invoices with payment due thirty (30) days after receipt of invoice or goods/services, whichever is later?

Contractor Answer:

WT Cox Information Services shall provide appropriate invoices with payment due thirty (30) days after receipt of invoice. Because we prepay all orders to guarantee delivery, prompt payment is appreciated.

24. **Virginia Tech Question:**

Do you agree that the initial contract period shall be for five years?

Contractor Answer:

WT Cox Information Services agrees that contract period shall be for five years or longer.

25. **Virginia Tech Question:**

Upon completion of the initial contract period, do you agree that the contract may be renewed upon written agreement of both parties for five (5) one year periods, under the terms of the current contact?

Contractor Answer:

WT Cox Information Services agrees that initial contract period can be extended by five one-year periods under the terms of the current contract.

26. **Virginia Tech Question:**

Will you agree to participate in the Wells One AP Control Payment System?

Contractor Answer:

Yes, WT Cox Information Services will agree to participate in the Wells One AP Control Payment System.

27. **Virginia Tech Question:**

Please identify the highest-level executive in your organization that is aware of this solicitation. Describe that person's commitment to assuring the highest quality service to VASCUPP if your organization is awarded a contract.

Contractor Answer:

Michael T. Cox, the President of WT Cox Information Services as well as Michael Perrine, Vice President of Sales and Marketing are aware of this solicitation in its entirety. Both Michael Cox and Michael Perrine are committed to excellence of service. We promise to exhaust all administrative remedies in the pursuit of service to you. WT Cox Information Services executive management team prides itself on the high level of customer service we provide to our customers. Our goal is to achieve 100% satisfaction. Under the direction of our executive management team and staff, we are totally committed to quality of services and on-time delivery. We understand the importance of libraries ability to provide service to their patrons and we will work in the background to help you serve your clients. We will become your extra clerical support for issues of collection management. WT Cox Information Services provides the most cost efficient process in the industry and will help you to streamline delivery of library product and drive down the cost of doing business. WT Cox Information Services provides transition services by knowledgeable industry professionals. Finally, education and training will be the key to successful interaction between your vendor and your staff. We are committed to being the vendor you come to trust and rely on in your library.

28. **Virginia Tech Question:**

How soon after a possible contract award could you begin providing services?

Contractor Answer:

Service begins immediately upon contract award with a webinar conference call or onsite meeting of principles to facilitate a smooth transition.

29. **Virginia Tech Question:**

Please comment on your willingness to maintain registration and participation in the eVA internet procurement solution described in the RFP.

Contractor Answer:

WT Cox Information Services is a registered member of the eVA internet procurement solution and has been for many years.

30. **Virginia Tech Question:**

Are the prices for all goods/services listed in your proposal inclusive of all applicable eVA system transaction fees?

Contractor Answer:

Yes, our prices are inclusive of the eVA system transaction fees.

31. **Virginia Tech Question:**

Do you acknowledge, agree and understand that VASCUPP cannot guarantee a minimum amount of business if a contract is awarded to your company?

Contractor Answer:

WT Cox Information Services acknowledges, understands and accepts that VASCUPP cannot guarantee a minimum amount of business if a contract is awarded to our company.

32. **Virginia Tech Question:**

Do you agree that no import customs clearance fees, customs duties, taxes, or other costs or additional fees shall apply to any possible resultant contract?

Contractor Answer:

WT Cox Information Services agrees that no import customs clearance fees, customs duties, taxes, or other costs or additional fees shall apply to any possible resultant contract.

33. **Virginia Tech Question:**

Do you acknowledge, agree, and understand that the terms and conditions of RFP #0041984 shall govern the contract if a contract is awarded to your company?

Contractor Answer:

WT Cox Information Services acknowledges, agrees, and understands that the terms and conditions of RFP #0041984 shall govern the contract.

34. **Virginia Tech Question:**

For purposes of interacting with the VASCUPP's ordering systems, please identify the person (name, phone number, email address, etc.) in your company that would serve as liaison for a) e-commerce, b) accounts receivable, c) emergency orders.

Contractor Answer:

The point of contact for interaction with VASCUPP's ordering system is as follows:

*Dawn Ashton
800-571-9554 Ext. 233
dashton@wtcox.com*

*Secondary Point of Contact
Allison Thompson
800-571-9554 Ext. 242*

*Manager of Accounting
Tom Amann
800-571-9554 Ext. 211
tamann@wtcox.com*

***CONTRACT ADMINISTRATOR
Debra M. Knox
800-571-9554 Ext. 215
dknox@wtcox.com***