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1. PURPOSE

The purpose of this Request for Proposal (RFP) is to solicit sealed proposals to establish a contract or contracts through competitive negotiations for 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 three year(s), or as negotiated. There will be an option for two one- year renewals, or as negotiated.

III. BACKGROUND

The Virginia Tech University Libraries serve a student body of more than 26,000 through multiple service locations on the local campus and other campuses throughout the Commonwealth of Virginia. The University Libraries consist of the Carol M. Newman Library and three branches: Art/Architecture, Veterinary Medicine and the Northern Virginia Graduate Center. The University Libraries are a member of the Association of Research libraries.

In the university's fiscal year 2002/2003, the University Libraries continuations expenditures were approximately $4,210,800. 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 needs and funding require.

IV. CONTRACT PARTICIPATION

Under the authority of the Code of Virginia 2.2-4304. Cooperative Procurement, it is the intent of this solicitation and resulting contract(s) to allow for cooperative purchasing by only the Virginia Association of State College and University Purchasing Professionals (VASCUPP) and all other Commonwealth of Virginia public institutions of higher education (to include four-year, two-year and community colleges). Current VASCUPP institutions include: College of William and Mary, University of Virginia, George Mason University, Virginia Military Institute, James Madison University, Old Dominion University, Virginia Tech, Radford University and Virginia Commonwealth University. A list of all other Virginia Public Colleges and Universities is available at

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http://www.ExploreVirginiaColleges.com/. In addition, the lead-issuing institution may allow local governments, school boards and other agencies serving local governments in their region access to this contract(s).

Participation in this cooperative procurement is strictly voluntary. If authorized by the Contractor(s), the resultant contract(s) will be extended to the public bodies indicated above to purchase at contract prices in accordance with contract terms. The Contractor shall notify the lead-issuing institution in writing of any such institutions 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 VASCUPP members and public institutions accessing the Contract. Participating public bodies shall place their own orders directly with the Contractor(s) and shall fully and independently administer their use of the contract(s) to include contractual disputes, invoicing and payments without direct administration from the lead-issuing institution. The lead-issuing institution shall not be held liable for any costs or damages incurred by any other participating public body as a result of any authorization by the Contractor to extend the contract. It is understood and agreed that the lead-issuing institution is not responsible for the acts or omissions of any VASCUPP member, or public body and will not be considered in default of the Agreement no matter the circumstances.

Use of this contract(s) does not preclude any participating public body from using other contracts or competitive processes as required by law.

V. <u>STATEMENT OF NEEDS</u>

A. **General**

The Contractor shall service periodicals, serials, publishers' series, and continuing titles, (hereafter together referred to as Continuations) for Virginia Tech's University Libraries. Servicing shall include the provision of all continuations, renewals and new orders, handling of claims, and regular invoicing.

Swets Information Services provides a full range of professional serial management services, including the management of periodicals in all formats: print, electronic, CD-Rom, microforms and the supply of back issues. This management service also includes all ordering, renewals, claim handling, and invoicing for same.

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B. **Customer Service**

1. The Contractor shall assign a specific in-house account representative who handles the Virginia Tech orders, claims, cancellations, requests for reports, invoicing questions, etc. The in-house representative shall respond via e-mail, telephone, and/or fax to all inquiries within two (2) business days, e-mail preferred. A Contractor's representative shall visit Virginia Tech, upon request, to discuss service to Virginia Tech's account and other continuations management issues.

Swets Information Services provides all customers with one point of contact for serials acquisition and management. Upon contract award, a dedicated account manager is assigned and assists the customer service staff in handling all processing of orders, claims, invoicing, and other day-to-day needs.

This assigned Account Manager oversees daily account management, ensuring efficient operation of the account. Services include:

- Orders
- Cancellations
- Bibliographic questions
- Renewals
- Claims
- Invoices
- Credits/refunds
- Special requests
- Publisher queries, etc.

Additionally, the Account Manager works closely with specialists from other areas of the business, such as our Publishing Processing and Electronic Media Services departments, to ensure that customers receive the best possible service. A Swets Information Services Account Manager is available for site visits upon request.

2. The Contractor shall provide toll-free telephone numbers, fax numbers, and e-mail addresses for all staff assigned to Virginia Tech's account.

Swets Information Services provides toll-free telephone numbers, fax numbers, and e-mail addresses for all staff assigned to customer accounts.

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3. The Contractor shall maintain accurate and current records of Virginia Tech's active continuations orders in the Contractor's online catalog and subscription management database.

Swets Information Services maintains accurate current customer records in the Swets bibliographic and order management database, which can be viewed online through Dataswets*Connect*, our online communication system. Dataswets*Connect* gives you real-time access to the same data that your Account Manager and Customer Service staff see when managing your subscriptions. For more information pertaining to Dataswets*Connect*, please refer to Section V, J.2.

Dataswets*Connect*
Standard Features

- Web-based Internet access to your subscriptions as they reside on our system
- Subscription information
- Publisher payment information
- Bbibliographic details, account address info, invoice details, subscription status, membership/package information
- Access to our database of 250,000+ titles
- Ordering of new subscriptions
- Ordering of single issues
- Claiming of missing issues
- Sample issue requests
- View *For Your Info* subscription management reports (no additional cost)

Special Features

- Check-in data for over 60,000 titles
- Check-in data generated as part of the journal consolidation service
- Determination if claim is necessary
- Simplification of volume and issue selection for ordering, claiming, subscription information
- Viewing by all customers - not restricted to actual consolidation services users

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C. **Orders**

1. The Contractor shall process and confirm new orders within ten (10) working days of receipt from Virginia Tech. Orders and payments to publishers shall be released to publishers within ten (10) days of receipt of a new order and three (3) months before the expiration date of renewal subscriptions.

As part of Swets Information Services standard subscription services, the customer Account Manager will process and place new orders within 48 hours of receipt. The University Libraries will receive confirmation in the form of our Order Confirmation report, which is one of many For Your Info Management Reports that provide detailed information about your subscriptions. These reports are available weekly or monthly. Swets will forward payment for subscriptions to all publishers far enough in advance to ensure that no missed issues occur due to late payment.

Swets Information Services' annual renewal cycle begins at the end of April. Customers are sent a checklist of their current subscriptions (a holdings list of all subscription a customer has on order; this report can be broken down by country of origin, publisher, and fund code). Swets will not renew without customer instructions. Swets' Subscription System is programmed to monitor and produce, on a weekly basis, all customer titles that need to be ordered and paid per the publishers' criteria. An automated tracking system monitors the placement of renewal orders and outstanding un-remitted checks sent to publishers. As most renewals are sent electronically, publisher response is immediate. Payment is always made to the publisher in time to ensure renewal and continuation of the library's subscription.

If a customer is using SwetsWise Subscriptions, orders are immediately transmitted to our ordering system. Orders placed via SwetsWise are processed automatically and are forwarded to the publisher along with traditionally ordered titles. For more detailed information, please refer to Section V., J.2. Swets Information Services can confirm the placement of orders for customers within 24 hours of receipt. As soon as the order has been inputted into our operating system, an order number is generated, and the order becomes traceable.

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2. The first issue of a new order should be delivered to Virginia Tech within eight (8) weeks for North American publishers and ten (10) weeks for other publishers, or when Virginia Tech has designated that the next volume should begin.

Please note that most publishers process new orders within six to eight weeks, but the delivery of the first issue of a new order is dependent on the publisher's policies and publishing schedule.

Swets Information Services provides a variety of reports to help manage the customer subscriptions, including an Order Confirmation Report. All such management reports can be sent on a weekly, monthly, or annual basis. Notification will take place within 15 days of publisher confirmation of the new order.

The following details are included in the Order Confirmations Report:

- Title name and ISSN
- Frequency of publication
- Reference numbers (ours and yours)
- Your request date
- Period, beginning with first issue
- Publisher conditions
- Estimated price

Should new orders not be confirmed by the publisher within 60 days of submission, your Account Manager will first check the Swets Information Services system to confirm that the order was placed, that payment was submitted and that the check was cashed or payment received by the publisher. Then, the Account Manager will contact the publisher to request that the orders be confirmed and that the issues be forwarded.

3. The Contractor shall accept new orders from Virginia Tech at any time during the year. These orders shall be merged into the next main renewal invoice.

Swets Information Services will accept new orders at any time during the year, for the current calendar year, the upcoming calendar year, or the latest issue published, dependent on individual publisher policy. Upon order acceptance from publisher, the order can then be merged into next renewal invoice.

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4. Virginia Tech 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.

Swets Information Services accepts and agrees. As mentioned above, Swets will accept new orders at any time during the year, and will comply, dependent on publisher conditions, with Virginia Tech's request to specify the beginning issue and/or start date of a new subscription. But please be aware that publishers might have set conditions regarding the start date of a new subscription. For instance, all subscriptions to a title might have a start date of January. At Swets, we can "back start" orders, which provides back issues to a subscription on order.

5. The Contractor shall accept subscription orders as automatic renewals (i.e. to run until forbid).

Swets Information Services will accept subscription orders as automatic renewals (i.e. to run until forbid), as required.

Our annual renewal cycle begins at the end of April, when we send you a checklist of your current subscriptions on order with Swets Information Services. Customer records are kept on a 'Till Forbid' or Year-Only basis, according to client preference. For clients on a Year-Only arrangement, we do not renew without instruction.

6. The Contractor shall provide special and priority handling of rush orders.

Swets Information Services provides specialty and priority handling for all rush orders within 24 hours of receipt. The customer's assigned Account Manager, working in tandem with publishers, handles all rush orders. Once the order is placed, the system produces a check for the order within 24 hours of receipt.

7. 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 Virginia Tech of supplementary items not included as part of the subscription, and indicate handling procedures for the same.

If part of the paid subscription, Swets Information Services will automatically provide all indexes, supplementary numbers and added volumes. We will not automatically order indexes, special or supplementary

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issues, or added volumes that are not included in the subscription price, and will notify the University Libraries when/if such items are available and request order instructions.

Swets Information Services provides any supplementary items available from the publisher for the customer. Orders for such items can be placed at the time of your initial ordering or renewal process or at any other time throughout the year. In the event that there is no set publication schedule for supplements, Swets Information Services will use our Publisher Processing Administrators (PPAs) to communicate frequently with publishers to acquire any information a customer is entitled to. Swets Information Services will then generate a supplementary invoice to cover the cost of any additional material requested.

8. If unable to supply a title, the Contractor shall notify Virginia Tech within thirty (30) days for North American titles and forty-five (45) days for other titles.

Swets Information Services accepts and agrees.

9. Order substitutions or additions of titles shall not be permitted unless expressly authorized by Virginia Tech on a title-by-title basis.

Swets Information Services accepts and agrees.

D. **Claims**

1. The Contractor shall provide a flexible, fast, and effective online claims service with reporting and reclaiming assistance features. Virginia Tech may claim missing issues through the Contractor or directly from the publisher.

Claims can be transmitted electronically by e-mail, via FTP, or through Dataswets*Connect*, our on-line information system. We have also developed interfaces with ILS system vendors to allow libraries to transmit claims electronically. Paper claims via a library letter or memo, or generated from the library's ILS system, can be sent by fax or by standard mail. Reclaiming is also available through the same options.

Our Account Managers record all claims and any corresponding follow-up into the Swets Information Services system. The process gives both the customer and the Account Manager an audit trail of claim activity. All incoming claims are screened against our records, checking the pertinent

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subscription and billing records, as well as the check-in data generated by our journal consolidation service. On the basis of these checks, Swets either reports back with relevant information, or processes the claim as a first or second entry. A side-benefit of our optional Journal Consolidation (check-in) service and *Backsets* service is our ability to maintain a stock of 450,000 single issues for many currently published titles. Because of our own stock issue collection, we can quickly fill 20% of our claims, <u>at no charge to our customers.</u>

A unique aspect of Swets Information Services's service is the deployment of our Publisher Processing Administrators. For any repeated claim, the Publisher Processing group steps in and works directly with their contacts at the publisher to resolve the claim as quickly as possible. Swets Information Services provides "country-of-origin" publisher relations support by staffing our offices in countries where the majority of journal publishing takes place. Publisher processing staff is located in The Netherlands, Germany, UK, France, Sweden, Norway, and the United States. Therefore, if there is a non-responsive publisher, Swets will employ its common system to notify colleagues working with publishers locally. The Publisher Processing Administrators work together with your Account Manager to provide rapid resolution of claims.

In sum:

Claims Reports
Claims acknowledgement and responses are communicated to customers through *FYI* reports. These reports are sent to an email address, or through postal mail. These reports are also available online through DataswetsConnect.

Claims
Claims/Reclaims are submitted electronically online through Dataswets*Connect*, by email or postal mail, or by fax. Customers using an Integrated Library System (ILS) are encouraged to discuss EDI possibilities with their Regional Sales Manager.

Review and Action
Customer Service reviews incoming claims and records the claim in the Swets Business System. The claim is then submitted to the publisher for action.

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Swets retains stock of single issues in the Swets Consolidation Services business unit and accesses this inventory to expedite claims processing. If the issue is available it is sent to the customer via express mail. The client is notified that the claim has been satisfied. Stock availability including receipt data may be viewed in Dataswets*Connect*.

Electronic Media
Within the Customer Service Department is an electronic media team dedicated to product support, providing reports and assisting Account Managers in responding to customer requests.

2. Virginia Tech will submit claims to the Contractor by telephone, e-mail, fax, letter, and/or Contractor's online claiming module.

Swets Information Services accepts and agrees.

3. The Contractor shall submit claims to the publisher within five (5) working days of receipt from Virginia Tech.

Swets Information Services submits claims no later than 2 business days after notification from customer.

4. The Contractor shall notify Virginia Tech of the status of all outstanding claims via a monthly report. The Contractor shall also respond to individual requests for claims status via e-mail, fax, or telephone.

Swets offers claiming services for both print and electronic titles as part of our full subscription management service.

Our *For Your Info* serials management reports provide detailed information about your claims. Claim Confirmations provides information on claims that have been received and processed, while Claim Answers provides a response on how the claim is being resolved. These reports can be sent weekly or monthly and are available via email and paper. Customers can also review their *For Your Info* reports through Dataswets*Connect*, our online communication system. *For* specific cases, your Account Manager can respond by telephone, e-mail, or facsimile.

To assist the customer in managing claims, Swets provides access to Dataswets*Connect*, an online database that allows you to monitor and update outstanding claims through real-time access. Swets also delivers claims activity reports via For Your Information (FYI) bulletins available in DataswetsConnect, and by email or regular mail.

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5. On claims for missing issues submitted by Virginia Tech 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.

Swets Information Services works to obtain replacement copies at no charge for all defective, mutilated, or lost issues, but is dependent on publisher restrictions for such matters. If the publisher provides a refund for a missing issue, Swets Information Services will pass on the refund to the claiming Library in the form of a credit note.

Swets Information Services also maintains a stock supply of approximately 450,000 single issues for many currently published titles, as a side benefit of our optional journal consolidation service. Because of our own stock issue collection, we can quickly fill 20% of our requests for back issues/replacements at no charge to our customers. A customer can easily view which issues we have in stock through Dataswets*Connect*.

E. **Cancellations**

1. The Contractor shall cancel individual titles at any time during the subscription year when notified by Virginia Tech.

Swets Information Services provides customer support for cancellation of subscriptions in accordance with our service guidelines and individual publishers' policies and restrictions. Some publishers do not accept cancellations or offer refunds.

Cancellations are accepted at any time during the subscription term as Non-Renewals, processed at no incremental charge and serviced during the remainder of the paid subscription term. Cancellations with cessation of shipment and issuance of pro-rated refund or credit are accepted if six months or more remain on the subscription term and if publishers' policies permit. An incremental administrative fee of $25.00 per subscription will be assessed for each refund or credit issued. Individual subscription Refunds or Credits will not be provided when the publisher's prorated Refund or Credit would total less than $35.00 on a given subscription. Swets Information Services service charges are not subject to Refund or Credit unless Swets Information Services erred in processing the subscription order. Your Account Manager can provide valuable assistance in the cancellation process.

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The most appropriate time for cancellations is after the annual checklist of subscriptions is received in April. Please bear in mind that the majority of publishers need approximately 6-8 weeks for processing.

When cancellation for a subscription takes place at expiration and the library has not yet renewed their subscription, we will cancel with the publisher. Swets Information Services does not assess charges for cancellation by the publisher. If a library has chosen to order or renew a subscription, but later decides to cancel before the publisher has been paid and before any issues have been published, it is likely that the publisher may accept a cancellation at this time.

If cancellation is requested after a subscription has already been ordered or renewed, and the publisher has already been pre-paid for that subscription, the cancellation request is considered not to have been received in time. If no issues have yet been published, it may be possible to have the publisher issue a refund. The publisher may, however, refuse to do so. Your Account Manager can provide valuable assistance in the cancellation process.

Once the cancellation has been processed, the title record is removed from the title list and is not displayed on subsequent renewal lists and invoices.

Please note that publishers do not tend to issue credits for titles cancelled mid-year. For this reason Swets Information Services urges customers to submit their cancellation requests no later than October 15.

Swets Information Services will process your request for cancellation or copy change within 5 days. However, we must execute cancellations in accordance with publishers' guidelines.

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

Swets Information Services will submit cancellations to publisher when submitted by Virginia Tech within the guidelines outlined above. Ultimately, whether or not the cancellation is accepted is determined by the publisher.

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3. The Contractor shall acknowledge receipt of Virginia Tech's cancellation notice via e-mail, letter, or regular report. Cancelled titles shall be deleted from further renewal listings and invoices. Cancelled titles shall automatically be deleted from the next main renewal invoice list.

Swets Information Services accepts and agrees.

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 Virginia Tech.

Regardless of when the customer cancels a title, Swets Information Services will make every attempt to pursue a full refund for any funds paid to the publisher for the cancelled title on the libraries' behalf. Cancellations with cessation of shipment and issuance of pro-rated refund or credit are accepted if six months or more remain on the subscription term and if publishers' policies permit. An incremental administrative fee of $25.00 per subscription will be assessed for each refund or credit issued. Individual subscription Refunds or Credits will not be provided when the publisher's prorated Refund or Credit would total less than $35.00 on a given subscription. Swets Information Services service charges are not subject to Refund or Credit unless Swets Information Services erred in processing the subscription order. Please note that publishers do not tend to issue credits for titles cancelled mid-year. For this reason Swets Information Services urges customers to submit their cancellation requests no later than October 15.

F. **Reports**

1. The Contractor shall issue monthly reports and make the monthly report data available online. These monthly reports to include, but not be limited to, the following:

      Ceased publications
      Suspended publications
      Publication delays
      Publishing frequency changes
      Publisher changes
      Title changes
      Title mergers and splits
      New volumes
      Titles and issues claimed
      Titles that the Contractor can no longer supply

Membership or combination subscription changes
Titles recently cancelled by Virginia Tech
Price increase alerts
Electronic availability (for new orders only)

Agreed. Swets Information Services provides standard and custom reports at no extra charge. Swets' standard reporting, called *For Your Info* (FYI), provides detailed information about a customer's subscriptions, including bibliographic changes, order amendments, subscription messages, order confirmation, cancellation confirmation, claim confirmation, claim answer, and order corrections, and all listed above. *For Your Info* also provides an annual report of new publications, sorted by subject area. All *For Your Info* reports, subscription checklists, and financial analysis reports remain a standard part of our service, free-of-charge.

Customers may customize the frequency of these standard reports, with delivery options of monthly, quarterly, yearly, or no report at all. Standard reports are sent via e-mail or regular mail, or can be viewed on Dataswets*Connect*.

Custom reports offer more complete management and reporting of customer subscriptions and can be delivered electronically: examples of past custom reporting include sorting by subject classification, title, publisher name, ISSN, budget codes, purchase order numbers, format, costs, and many other customer-designed fields. Below is a sample of standard reporting currently available:

- Bibliographic Changes
- Cancel Confirmations
- Claim Answers
- Claim Confirmations
- Electronic Journal News
- Invoice Amendments
- Non-Subscription Orders
- Order Confirmations
- Subscription Messages

Subscription Checklists – A holdings list of all customer subscriptions on order, this report analyzes holdings by country of origin, publisher, and fund code, among others.

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Membership/Group Packages with Titles – Summarizes titles that customers can expect as result from a membership or package arrangement. Informs customers which titles come as part of such subscription. Shows which titles make up the various membership and group packages to which the library has subscriptions. Informs customers when they have ordered a title that is available within a group package.

Financial Analysis Reports - Displays price of each separate subscription over a period of up to three years, along with overall percentage increases. Included are separate breakdowns for country of origin and subject. Reporting can be split by purchase order number and/or budget code, and can be customized to customer requirements.

Electronic Journal Comparison Reports – informs customers if subscriptions are available in an electronic version; if the electronic component is free when a print subscription is purchased; or if an additional cost is assessed.

New Publication Announcements – A report detailing new scholarly publications

Please see Appendix I for sample reports.

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:

      Average total service charge
      Individual service charges
      Subscriptions listed by Library of Congress classification or title
      Total expenditures by subject classification
      Number of claims submitted
      Number of claims resolved
      List of membership and combination titles
      Complete records of all financial transactions processed for the Libraries
      Current titles on order, in alphabetical sequence, title prices and current price adjustments,
      frequencies, quantities, invoice identification and unique library-specified codes

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Swets Information Services can produce both standard and customized management reports in both print and in a variety of electronic formats at Virginia Tech's request. Most customized reports are available at no charge. However, should a customized report require special programming or system modifications, additional costs may be assessed.

Swets Information Services provides customized reports upon request, including a variety of fiscal management reports, which are provided to customers on an as-needed basis, including all listed above. Reports can be furnished in the format desired by the institution, including Excel, Access, paper, FTP files, via e-mail and/or on diskette. Swets Information Services can provide the following reporting: Electronic Journal Price Comparison Report, SwetsWise Online Content Matching List ands Cost Analysis Report, Gratis Internet Checklists, E-Media Checklists and Customer Pricelists.

3. The Contractor shall regularly notify Virginia Tech of the availability of supplementary materials related to subscriptions, i.e. supplements and special issues not included in the main subscription.

Swets Information Services notifies and provides any supplementary items available from the publisher for the customer. Orders for such items can be placed at the time of your initial ordering or renewal process or at any other time throughout the year. In the event that there is no set publication schedule for supplements, Swets Information Services will use our Publisher Processing Administrators (PPAs) to communicate frequently with publishers to acquire any information customers are entitled to. Swets Information Services will then generate a supplementary invoice to cover the cost of any additional material requested.

4. The Contractor should provide custom fiscal and collection management reports in a timely manner as requested by Virginia Tech. Reports should be provided in electronic spreadsheet format.

Swets Information Services provides customized reports upon request, including a variety of fiscal management reports, which are provided to customers on an as-needed basis. Reports can be furnished in the format desired by the institution, including Excel, Access, paper, FTP files, or via e-mail. Swets Information Services can provide the following: Electronic Journal Price Comparison Report, SwetsWise Online Content Matching List and Cost Analysis Report, Gratis Internet Checklists, E-Media Checklists and Customer Pricelists.

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G. **Shipments**

1. Delivery of all materials shall be made FOB destination inside the Newman Library at the following address:

> Virginia Tech
> University Libraries
> Technical Services / Serials Receiving
> P.O. Box 90001
> Blacksburg VA 24061-9001

Swets Information Services accepts and agrees.

2. Virginia Tech 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.

Swets Information Services works to obtain replacement copies at no charge for all defective, mutilated, or lost issues, but is dependent on publisher restrictions for such matters

If an issue is not available from the publisher, we may be able to provide the issue from our own stock. Swets Information Services maintains a stock supply of approximately 450,000 single issues for many currently publisher titles, as a side benefit of our optional journal consolidation service. Because of our own stock issue collection, we can quickly fill 20% of our requests for back issues/replacements at no charge to our customers. A customer can easily view which issues we have in stock through Dataswets*Connect*.

H. **Pricing**

1. Virginia Tech reserves the right to obtain supporting documentation on prices from the Contractor at any time during the contract period.

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I. Invoicing

1. The following information shall appear on each invoice:

Name and address of the Contractor
Library bill-to address
Library ship-to address
Account number assigned by the Contractor
Library purchase order number for each title
Contractor title number
Title (include a breakdown of titles which are parts of memberships or combinations, series title)
Publisher
Frequency
Indication as to whether title is new, a renewal, transfer, or additional copy order
Number of copies being ordered for each subscription
ISSN
Period covered (inclusive dates)
Volume number (beginning with new title)
Current published price
Service charge, if any
Shipping and handling fees
Summary page detailing total prices, total additional charges (if any), and net total
Library fund designation supplied by Virginia Tech
Format

Swets Information Services accepts and agrees with the following exceptions:

- Title (include a breakdown of titles which are parts of memberships or combinations, series title): invoices do not include a breakdown of titles which are parts of memberships, combinations, or packages. However, we can provide reports that list membership and group titles upon request.

- Indication as to whether title is new, a renewal, transfer, or additional copy order: we will denote whether a title is a new order or a renewed title.

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- Number of copies being ordered for each subscription: each subscription is listed separately. If there are multiple orders for a title, they will be listed separately on the invoice.

- Shipping and handling fees: these are included in the publisher list price.

- Format: we will denote Internet, print + Internet. Print is the default.

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

Should Swets Information Services issue additional charges, the supplementary invoice will describe the reason for the charge. However, because Swets Information Services does the majority of its invoicing on a firm price basis, there should be very few additional charges. Please note that credits are listed separately from invoices.

3. Separate Invoices. The Contractor should supply separate invoices as requested by Virginia Tech.

Swets Information Services can customize invoices as requested by the customer.

4. The Contractor shall supply invoices in electronic format to the attention of:

        Curtis Carr
        Library Systems Department
        curtis.carr@vt.edu
        (540) 231-6617

Swets Information Services acknowledges and agrees.

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5. Two additional copies of invoices shall be addressed to the attention of:

> Virginia Tech
> University Libraries
> Business Services
> P.O. Box 90001
> Blacksburg VA 24061-9001

Swets Information Services acknowledges and agrees.

One additional copy of invoices shall be addressed to the attention of:

> Virginia Tech
> University Libraries
> Technical Services / Serials Receiving
> P.O. Box 90001
> Blacksburg VA 24061-9001

Swets Information Services acknowledges and agrees.

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

Swets Information Services ensures that all payments are made to the publisher in time to ensure the timely initiation or renewal of a subscription. Proof of payment is available upon request. Proof of payment is also available online via Dataswets*Connect* on a per subscription basis, enabling the University Libraries to see when a check was generated for publisher payment and when the check was cashed.

7. The Contractor shall issue a check to Virginia Tech for all outstanding credits at the end of the contract period.

Swets Information Services will ensure that any credits received for cancelled subscriptions will be forwarded in full to the customer. Whether refunds are granted or not depends on the individual publisher's policy, as noted above.

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J. Online Support

1. The Contractor shall provide Virginia Tech 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.

Swets Information Services agrees. See response J.2. for fuller response.

2. The Contractor shall provide Virginia Tech with the ability to search the Contractor's online catalog and subscription management database to determine availability, cost, and other variables prior to placement of an order. The Contractor should provide training on how to use the database at no cost to Virginia Tech.

Swets Information Services offers two basic platforms for subscription services: **Dataswets*Connect***, our online interactive information service that provides customers with access to our subscription database, free of charge and **SwetsWise Subscriptions**, the web-based e-procurement subscription management system. Dataswets*Connect* coordinates all ordering, claiming, renewing, and invoicing through an Account Manager, located in the Runnemede, New Jersey office, whereas SwetsWise coordinates all ordering, claiming, renewing, and invoicing through the SwetsWise system.

Dataswets*Connect*

Swets Information Services provides all customers with free access to our internal bibliographic and subscription database through Dataswets*Connect*. Dataswets*Connect* is the University Libraries' window into Swets Information Service's internal bibliographic and order management datasets. This service gives you real-time access to the same data that your Account Manager staff see when managing your subscriptions.

Dataswets*Connect* keeps you informed about the overall status of your orders and the publication dates of the journals the Library subscribes to. The service also enables you to save time in transmitting claims and orders to your Account Manager.

Dataswets*Connect* provides customers with online access to our subscriptions database of more than 260,000 titles. Access to this real-time database is via the World Wide Web and is free of charge. Customers have

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access to the check-in data of 60,000 titles, courtesy of our journal consolidation service. This unique feature expedites the claiming process, enabling you to verify that the pertinent issue has been published and received in our office, with the exact date of receipt being shown.

Dataswets*Connect* offers:

- Complete bibliographic information
- Advanced searching using Boolean search engine
- Detailed subscription records
- Issue status
- Easy, online claiming
- Publisher payment information (where available)
- Complete 5 year payment history

Access to Dataswets*Connect* is possible through IP or user ID and password. Security access to specific functions can be limited by user.

Dataswets*Connect* is accessed through any public data communication network or the World Wide Web and is possible through IP or user ID and password. Electronic orders are transmitted through e-mail, FTP, or other vendor interface;. paper orders transmitted via letter, fax or memo. Swets Information Services provides pre-printed order forms upon request. The following features of Dataswets*Connect* enables users to:

- perform a bibliographic search of more than 260,000 publications, to include information on publisher, frequency, subject, ISSN, and pricing
- review the details of all subscriptions on order through Swets Information Services, to include order date, order and budget number, invoice date, totals and amounts charged for the current and previous year
- order new titles and claim missing issues, with access to current publication details for the 60,000 titles handled by the journal consolidation service (see more below) order back runs or request catalogs from Backsets (see more below) determine information regarding Packages and Memberships access *For Your Info* management reports, to include claim answers, order confirmations, bibliographic changes and electronic journals

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SwetsWise

Chief among our newest innovative solutions is SwetsWise, a single point of access to a large and growing range of full-text publications, TOCs and abstracts. Users can access and control such subscription management functions as the search and selection of publications from our online catalog, place orders and claim missing issues either directly via the Internet or through an e-procurement system.

SwetsWise enables organizations to order and manage subscriptions, locate and retrieve serial content, or both, as efficiently and cost-effectively as possible. SwetsWise offers two modules drawn from one platform: **SwetsWise Subscriptions** and **SwetsWise Online Content**. The subscription module provides full control over the entire subscription management process, while the online content module enables management and online access to electronic publications. Subscribers benefit from either module separately or choose the full power of both modules integrated.

Subscription Module

The subscription module provides subscribers full control over the entire subscription management process. With SwetsWise subscriptions, end-users can search and select titles from our online catalog, place orders, claim missing issues and more, all from a distributed desktop environment. With an automated approval cycle and integrated reporting capability, the information specialist always retains control.

The SwetsWise subscription module also provides easy title searching, reviewing, ordering and tracking. Within an easy-to-use desktop environment, end-users browse through the Swets Information Services catalog of over 260,000 titles using basic and advanced searching capabilities. SwetsWise uses a full Boolean search engine with familiar search techniques to find records. You search for records using any number of fields: title, publisher, keyword, language, format and ISSN; or restrict your search to specific publications types such as book series, electronic media or microform. SwetsWise presents detailed title information, including publisher, frequency, available formats and price. Upon identifying a title for purchase, the end-user moves forward with the approval process or places the title in a shopping cart. Purchase items remain valid in the shopping cart for 30 days. Orders can be processed through credit or procurement card, or through traditional invoicing methods.

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An optional two-phase approval process provides control over your serial expenses. To avoid duplicate subscriptions, for example, SwetsWise employs a "Who Has It" button; to reduce unnecessary content procurement, for example, SwetsWise provides a catalog filtering mechanism that can exclude subject areas not relevant to your interests.

Budget codes and comments from the end-user accompany the order into the approval stage. Upon approval, orders are automatically sent to Swets Information Services for processing with an approval message forwarded to the end-user. Should an order not be approved, a message will be returned to the end-user to that effect along with an optional message from the approver. Features of SwetsWise subscription module include:

- Comprehensive functionalities for both end-user and administrator
- Order, renew, claim, cancel and check duplication of titles from the desktop
- Add, delete, edit users, shipping addresses and credit card details from the desktop
- Automated approval procedures that ensure system integrity
- Integrated reporting system
- Tracking of order histories
- Access to a 260,000title catalog with current prices and availabilities
- Numerous catalog management options, such as category and sub-category elimination
- Secure and easy-to-use interface with major e-procurement applications, including Ariba, SAP and Commerce One
- Basic and advance search capabilities
- End-user ordering, renewing and claiming
- "Who has it?" button to avoid duplication
- Catalog filtering mechanism that can exclude subject areas not relevant to your interests
- Detailed title information, from pricing to available formats
- Up to two levels for administrator approval
- Payment options for credit and procurement cards, and traditional invoicing
- Individual account creation for each user
- Advanced management functions to control all facets of your account
- Ability to view all orders and claims at the account level

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- Automatic email notification for subscription renewal
- Valid price holding for 30 days for purchases placed in shopping cart, regardless of pricing currency

The SwetsWise Title Bank

The SwetsWise Title Bank allows subscribers to customize their entire list of electronic subscriptions to include the listing of links from which users access the subscription content: publisher website, issue list from SwetsWise Online Content or a secondary database.

SwetsWise Title Bank assists customers in maintaining optimum control of their electronic resources, providing maximum, full-text access to all titles. Features include the ability to browse title and subject lists, conduct title and subject searches and consult both title and article-level usage data.

Swets Information Services will launch the SwetsWise Title Bank in two phases: Phase I in June 2004; Phase II by year end 2004.

Phase I includes the following functionalities:

- All Swets subscriptions added to the list automatically
- All SwetsWise Online Content subscriptions added to the list automatically, as well as the links to the issue list of the title.
- Customers will be able to add additional titles to the list by uploading a file or manually inputting through the interface.
- Titles added by customer will be matched against the catalogue available in the Swets Subscriptions System (SSS). If no match is found, the basic bibliographic data for that title will be filled automatically.
- Title search function will allow a search through the A to Z list.
- For customers using an Open URL resolver such as SFX, the "SFX" link will be included in the list also.
- Customers will have 3 holdings information fields to be used to create the links to the various databases (eg, adding a link to a ProQuest database to a title).
- Usage statistics on the link-through of the different titles will be available.
- Customers will be able to upload their logo onto the interface.
- Customers using SwetsWise Online Content will have the option to hide certain SwetsWise Online Content screens.

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Phase II includes the following functionalities:

- SwetsWise will automatically link customer titles to the different databases, providing customers the capability, in addition to having all the links to the different databases, to add 3 holdings information per title.
- Customers will be able to upload their own subject classification for the titles. Should customer not include a subject classification, then SwetsWise will automatically add the LCC or DDC applicable category, depending on the classification chosen for the account.
- User will be able to search/browse the subject list to then reach a desired title.

3. The Contractor shall provide Virginia Tech with account, invoice, and payment information electronically.

Swets Information Services agrees. Virginia Tech already has access to this information through Dataswets*Connect*, as outlined above.

K. **Other**

1. Virginia Tech reserves the right to inspect the facilities of the Contractor at anytime during the contract period.

Swets Information Services invites Virginia Tech to inspect our facilities at anytime during the contract.

2. Upon request, the Contractor should provide Virginia Tech with trial access to future continuations management services and modules and other related peripheral services as they are developed.

Swets Information Services agrees.

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VI. 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 and three copies of each proposal must be submitted to:

> Virginia Tech
> Purchasing Department (0333)
> 270 Southgate Center
> Blacksburg, VA 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.

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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.

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B. Specific Requirements

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

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

Completed and signed per your instruction.

2. **Ability to provide service.**
a. A brief narrative statement (bullet points) describing the type and level of experience in providing similar services as described herein.

Swets Information Services has been the premier outsourcing and facilitating partner for the acquisition, access and management of scholarly, business and professional information for over 100 years. We are the essential link between 60,000 providers and 65,000 librarians, purchasers and end users. Swets Information Services also maintains Customer Advisory Boards worldwide to ensure we are meeting and exceeding our customers' expectations.

Swets Information Services provides you with a single point of contact for all your subscription needs – control, cost reduction and convenience through high-quality services. Swets Information Services offers you:

- Single point of contact
- Outstanding customer service as attested by our ISO 9001 accreditation
- Broad portfolio of products and services
- Commitment to innovation and quality
- Solid partnerships with major publishers and information suppliers
- Over 100 years of experience
- Global presence
- Local market knowledge

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Swets information Services offers a traditional platform of subscription management services supported by customer service, product managers, global networks, publisher relations staff, and a focused senior management team. We manage the day-to-day administration of your organization's subscriptions including:

- placing orders for titles regardless of format
- arranging payment
- claiming missing issues
- renewing subscriptions
- canceling subscriptions

Swets information Services provides our customers one point of contact for serials acquisition and management. We manage all aspects of subscription administration, from the provision of management information to assistance with collection development, budget control and planning.

b. Describe your ability to provide and service various types and formats of continuations materials and subscriptions as listed in Attachment C; be sure to mention exceptions and exclusions.

Swets Information Services can obtain content in any format from any publisher if the publisher will offer their information through a subscription agency.

Swets Information Services works with a global network of over 65,000 publishers to provide a full range of services including the management of serials in all formats: print, electronic, CD-Rom, microforms and the supply of back issues. The range of information and serials management services that we offer—including handling of claims and regular invoicing—assists in optimizing resources in today's dynamic and increasingly complex electronic environment.

Swets Information Services is capable of obtaining subscriptions for journals offered by publishers in an electronic format. More than 15% of the subscriptions handled by Swets Information Services are electronic, including publisher packages. Swets Information Services can facilitate the set-up of your electronic journal collection by notifying publishers on your behalf of your request for electronic access, and providing the necessary details such as customer contact information, institution IP address information, etc. Once your electronic subscription has been confirmed, Swets Information Services will help your institution gain access to the new

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electronic resource. We will arrange the necessary access details (Publisher URL, Username & Password, etc.) to be sent to you, either through an access confirmation report from Swets Information Services, or by arranging direct notification by the publisher. You will also have the option to access your electronic journals via SwetsWise Online Content.. Swets Information Services can also assist in every phase of the licensing process for electronic journals. Swets Information Services will work closely with you and the publishers of electronic journals to ensure that you have full access to your subscriptions.

In addition, SwetsWise Online Content, our service for electronic journals, offers libraries and their users a single point for access to content and management of their electronic serials. SwetsWise Online Content helps solve the problems faced by librarians such as new administration and access procedures in terms of password distribution, license administration, and arranging end-user access, as well as policy issues such as archiving and tracking the usage of e-journals.

SwetsWise Online Content is the result of years of discussions with librarians and publishers as well as an extensive technical development program with IBM. SwetsWise Online Content is accessible via the Internet and the World Wide Web using popular browsers such as Netscape and Internet Explorer.

Features of the service include:

- access to Tables of Contents, Abstracts and Full-text articles by authorized subscribers
- full searching of TOCs (Table Of Contents) and abstracts
- SwetsWise Online Content interface, TOCs and abstracts in HTML; Full-text in Adobe® PDF or Catchword Real Page®
- pay-per-view options
- extensive usage statistics
- access to back files
- searching of library's own holdings, individual/departmental collections, or full SwetsWise Online Content database
- information and technical support for electronic serials

The benefits of SwetsWise Online Content:

- access over 18,600 titles, of which ,7897 are full text journals, from 301 publishers
- easy access to electronic journals via our SwetsWise Online Content through seamless integration with the library's web-based catalog or Intranet through durable URLs
- powerful administrative features for the librarian to control access to electronic information and track the usage of TOC's, Abstracts, and Full-Text for collection development
- automatic claiming of electronic journal subscriptions
- a single source for electronic serials with greatly improved acquisition procedures and administration, and all the service benefits traditionally offered by Swets Information Services

SwetsWise Online Content is available in two levels: basic and advanced.

Functionality	Available With Module	
	Basic	Advanced
Document delivery	Y	Y
Entering Manager settings	Y	Y
Multi level linking	Y	Y
Pay-per-view	Y	Y
Viewing IP-settings	Y	Y
Viewing subscriptions	Y	Y
Viewing usage statistics	Y	Y
Creating Department favorites lists (admin)	Y	Y
Creating departments	Y	Y
Creating of user favorites lists	Y	Y
Creating SDIs	Y	Y
Creating TOC alerts	Y	Y
Creating user-ids	Y	Y
Entering articles to Filing cabinet	Y	Y
Remember search within session	Y	Y
Searching of articles	Y	Y
Uploading holdings information (MANUALLY)	Y	Y
Z39.50	Y	Y
ATHENS	Y	Y
Customization - defined sets	Y	Y

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Functionality	Available With Module	
	Basic	Advanced
Customization - replace email address icon	Y	Y
Customization - TOC alerts	Y	Y
SFX	Y	Y
Advanced user statistics		Y
Customization - department/favorites		Y
Customization - extracting/sending files		Y
Customization - uploading customer logos		Y
Customization - User/department set-up		Y
Linking to databases		Y
Upload Rights Management Information		Y
Upload Holdings Information		Y
License Bank*	Y	Y

Through a single interface, SwetsWise Online Content provides administrators better management of and users wider functionality with access to electronic content.

The Advanced option provides for:

- broader and deeper tracking and reporting of user activities
- customization to better reflect and mirror your institution's organizational structure and preferences
- linking to databases
- uploading rights management and holdings information

Both Basic and Advanced SwetsWise options provide better control over your collections, their expenditures and accessibility by providing better administrative management tools that control, delegate and oversee access to and use of electronic serials. Such tools provide administrators comprehensive set-up, management and reporting of user profile and activities, and serials management; for the user, SwetsWise Online Content provides accessing, searching, alerting, and storing of electronic content from ordering and viewing to searching and delivering, and much more.

Online content offers the opportunity to search for articles, publications and publishers and have access to the tables of content, the abstract or, if available, the full text of the desired information.

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SwetsWise is customizable: the end users can set their personal profile, alerts and favorites. SwetsWise has an intuitive interface, which makes it extremely easy to use. With only a few clicks any user can search for and order subscriptions from the extensive SwetsWise database. For example, searching on *transportation* and *planning* results within seconds in a list of publications, including information on title, price, format, online availability and the chance to order directly. Just a click on the *add to cart* button, for example, of the magazine Transportation will send all necessary information to the personal shopping cart.

The *who has it* button shows who else within the organization is subscribed to this title. With this function, duplications are minimized and costs are saved.

After finding the desired publications, just clicking on the *add to cart* button will direct a user to the shopping cart. In this screen an order can be edited and personal information can be added. Amongst others shipping address, payment method (e.g. credit card) and delivery method can be edited.

Besides searching and ordering magazines, journals, and other publications, SwetsWise offers the opportunity of decentralized management of subscriptions on a desktop. An overview of all subscriptions is shown, as well as the status. Also claiming missing issues is allowed.

Using the advanced article searching capabilities is one way of finding the articles of interest from the extensive article database. The search screen allows searching across different fields, use of boolean operators and several such search delimiters as subject headings and years.

This is not the only way in which desired article can be reached. Also the publication list or the publisher list can be browsed or searched.

In recognition that some organizations wish to use their own searching facilities, it is also possible to remotely search the database via the Z39.50 protocol. Furthermore, by using the SwetsWise Multi-Level Linking Technology, organizations can add a standard stable URL to their catalogue that will take the users from the organization's system directly to the appropriate publication, table of contents or the article itself. The level at which the user arrives is dependent on the level the stable URL has been defined. In this way, SwetsWise can be integrated into the organization's system and the organization is given full control over the searching options users have access to within the system.

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From here the user can either view directly the articles of interest or save them to a personal filing cabinet so that he or she can view them at a later point in time define a search alert, where the system will rerun this specific search according to the desired frequency and send the additional results in the desired format (html, ASCII text, comma delimited, etc.) via email.

Documents can also be ordered via pay per view.

An important element within any system is the provision of control tools to the administrator in order to establish what the different users are allowed to do. By selecting account under the administration tab of the header bar, the possibility to set the global settings of the account will be given.

From here the administrator can upload the organization's logo, that will be displayed on every screen of the system, control the catalog categories from which users are allowed to order subscriptions and define which individual functionalities should be available to all users, such as which document delivery suppliers can be used. It is normal that in an organization different users will have different rights and roles. It is therefore important to provide administrators with easy to use tools to customize the individual users rights and role.

An administrator can view different usage statistics reports that will give an overview of how users use the system. These statistics will provide information on how much a specific publication is used, how many times an article has been purchased via document delivery or pay per view or how effectively the search engine is being used. These different standard reports are available online within the system, but an administrator has also the option to download the raw data according to his or hers requirements and in the desired format. These offline statistics can then be integrated with the statistics of other resources or for doing further analysis of the SwetsWise usage.

The extensive 'administrator' functions in SwetsWise put you firmly in control over user activity: from ordering articles via document delivery or pay-per-view to providing access to customized catalogs. Subscriptions are visible to users as soon as they make the purchase. Our system allows the user to track the progress of their subscriptions via a status of the request online at anytime.

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The current subscriptions database catalogue consists of over 300,000 titles from over 65,000 publishers worldwide. It is accessible through Swets Information Services's web-based e-commerce solution, SwetsWise, described below, and via Dataswets*Connect*, Swets Information Services's online serials management system. Updates to the database are continuous and primarily customer-driven. Swets Information Services's catalogue is a dynamic listing containing electronic journals, irregular titles, and other forms of multi-media.

SwetsWise is Swets Information Services's newest, web-based e-commerce and management solution that enables information professionals to consolidate and manage their subscription needs via the Internet. It incorporates full e-procurement functionality, including approval processes, with full subscription management functionality. SwetsWise can be used for either central or end-user ordering. Users can also conduct basic and advanced searches of more than 250,000 titles in Swets Information Services's title database, and review the details of subscriptions on order.

Swets Information Services can provide the Library with e-journal management as a component of our complete subscription services. We provide initial set-up for online access to all electronic journals, will arrange for automatic access to all "free" electronic journals as they become available, and will assist with license management. We are currently developing a web-based licensing management service to help ease the administration of the details associated with licenses for electronic resources. Swets Information Services also can provide support in obtaining consortia licenses and access arrangements. Our North American team works closely with a group of special staff in our headquarters in Lisse, The Netherlands, whose function is to support customers that are consortia members.

SwetsWise Online Content also provides other value-added services, such as handling claims with publishers and providing swift access set-up for new e-journals. The Online Content module interfaces with Proquest, ISI Web of Science, Cambridge Scientific Abstracts and SilverPlatter. Furthermore, SwetsWise's Online Content module is OpenURL compliant and SFX enabled.

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c. Describe your ability to provide and service continuations subscriptions from domestic and non-U.S. publishers; commercial and noncommercial publishers; be sure to mention exceptions and exclusions.

Swets Information Services has 22 offices around the world, on 6 continents, and global headquarters located in Lisse, The Netherlands with the capacity to obtain journals from publishers in any country. Again, if a publisher, domestic or international, commercial or non-commercial, is willing to work with Swets Information Services, we can provide and service that subscription for any customer.

Total staff exceeds 1400 (including over 225 in North America) and has proficiency in over 25 languages. Worldwide offices include:

- Australia
- Belgium
- Brazil
- Canada
- China
- Denmark
- France
- Germany
- Holland
- Italy
- Japan
- Mexico
- Norway
- Russia
- Singapore
- South Africa
- South Korea
- Spain
- Sweden
- Turkey
- Taiwan
- United Kingdom
- United States

d. Evidence of financial stability for at least the last two years of the firm's operation. Include the Offeror's credit rating.

Audited financials are available for years 2001 and 2002 and are attached as Addendum A. Swets & Zeitlinger's D&B rating is 4A1-Worth $10,000,000 to $49,000,000: Rating composite High.

e. A brief description (bullet points) of the key individuals who would be assigned to any resulting contract, including the number and experience.

Karl Loeffler, current Customer Service Supervisor for Swets and dedicated Account Manager for Virginia Tech, will continue to service this account. Karl has been successfully handling the Virginia Tech account since 2000, when Virginia Tech contracted with Swets to service Virginia Tech's subscriptions. Karl comes to the account with over 7 years' experience in the subscriptions business, and over 4 years' experience handling the Virginia Tech account.

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f. A brief narrative statement (bullet points) describing specific plans for providing the proposed services, including how and when the services will be performed.

As a current Swets Information Services vendor, many of Virginia Tech's titles are already safely entered into our system. Swets Information Services ensures that orders previously placed with another agent, or directly with the publisher, are converted quickly and efficiently. It is our policy to indicate on all publishers' orders that a change of supply is involved. The transfer information is stored in our database records and publishers are alerted of the new arrangements.

Swets Information Services transfer process is as follows:

The titles to be transferred can be supplied in an Excel spreadsheet or comma-delimited file, via email, or via FTP. The following information is required:
- journal title
- ISSN
- subscription expiration date and the details of previous arrangements (i.e. whether direct or through another agent).

In some cases, publisher information may be needed. All subscription orders are entered into the Swets Information Services system. Any discrepancies are reported immediately to the library staff.

A complete title-by-title checklist is issued for verification
Upon approval, all transfer orders are processed
Swets Information Services can also provide bar codes free-of-charge to assist in updating records or, depending on the type of ILS system a library has, can send uploads that automatically update information.

Swets Information Services is also pleased to provide on-site transfer assistance: Account Managers are experienced in coordinating large transfers and will work closely with library staff throughout the process. A team can be made available to work with library staff to assist in updating records and supplying management reports as requested. The Account Manager can visit the library to help resolve any publisher discrepancies or other transition issues.

The time for claim resolution is dependent on the individual publisher. Upon receipt of the first claim, Swets Information Services looks to our existing stock, from which we are capable of filling as much as 20% of all claims, eliminating the need to work with publishers to replace these issues. The majority of the issues that can be found in Swets Information Services's stock are sent to the customer within 72 hours of the request.

Orders can be transmitted electronically, by e-mail, via FTP, or through Dataswets*Connect*, our online information and communication system. We have also developed interfaces with many ILS system vendors to allow libraries to transmit orders electronically. Paper orders via a library letter or memo, or generated from the library's ILS system, can be sent by fax or standard mail. Pre-printed order forms are available on request. Depending on the number of orders, Swets typically processes an order batch within two (2) business days.

Our annual renewal cycle begins at the end of April, when we send you a checklist of your current subscriptions on order with Swets Information Services. Customer records are kept on a 'Till Forbid' or Year-Only basis, according to client preference. For clients on a Year-Only arrangement, we do not renew without instruction.
Please note that the delivery of the first issue of a new order is dependent on the publisher's policies and publishing schedule. Swets Information Services provides a variety of reports to help manage the customer's subscriptions, including an Order Confirmation Report. All management reports can be sent on a weekly, monthly, or annual basis.

Notification to the Institution will take place within 15 days of publisher confirmation of the new order. The following details are included in the Order Confirmations Report:

- Title name and ISSN
- Frequency of publication
- Reference numbers (ours and yours)
- Your request date
- Period, beginning with first issue
- Publisher conditions
- Estimated price

Should new orders not be confirmed by the publisher within 60 days of submission, your Account Manager will first check the Swets Information Services system to confirm that the order was placed, that payment was

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submitted and that the check was cashed or payment received by the publisher. Then, the Account Manager will contact the publisher to request that the orders be confirmed and that the issues be forwarded.

Rush orders can be called or sent directly the customer Account Manager. The Account Manager can process and expedite the order with the publisher.

Most subscriptions are given a common expiration date of December 31. For those clients kept on a 'Till Forbid' basis, we automatically renew subscriptions in October, unless we hear to the contrary. Missing or damaged issues are handled online through Swets Information Services's claiming process. Claims may be submitted online via Swets Information Services's DataswetsConnect service, phone, fax or email. Once a claim is submitted, it is cross checked with Swets Information Services's supply of stock issues. If the claim cannot be filled from our stock, it is immediately submitted to the publisher for replacement.

The time for claim resolution is also dependent on the individual publisher. However, Swets Information Services is able to fill as much as 20% of all claims from our existing stock, eliminating the need to work with publishers to replace these issues. The majority of the issues that can be found in Swets Information Services's stock are received by the customer within 72 hours of the request.

Swets Information Services offers a standard reporting service called *For Your Info*. These reports provide detailed information about your subscriptions, claim confirmation and claim answer.

Customers have the flexibility to customize the frequency of each report. Options are weekly, monthly, yearly, or choose not to receive an individual report at all.

g. A narrative statement (bullet points) or statistical reports describing internal quality control procedures.

Swets Information Services demonstrates commitment to quality as reflected by an ISO 9001 accreditation, the international standard for quality assurance, for the past three consecutive years. Swets Information Services has recently been rewarded again with this critical certification. In practical terms, this provides a virtual guarantee of prompt delivery, reliability, effective processing of claims, status reports and a variety of additional

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management information services. Swets Information Services is the only subscription service provider to have been awarded this certification.

In addition Swets Information Services uses the following internal measures to monitor performance:

- Key Performance Indicators which are used by Swets Information Services's management to monitor staff performance
- Quarterly Review Meetings. An opportunity for customer to provide feedback on staff performance.
- Annual Appraisal & Target Setting. Performance is primarily measured against achievement of targets and the competency framework. The meeting provides an opportunity to discuss past and future performance, improvements arising as a result of training and development having taken place and career aspirations.

Swets Information Services maintains a global disaster recovery plan for all computer platforms within the organization. Backups are made of our systems on a daily basis and stored at an external facility for contingency purposes. In addition, Swets Information Services has established an agreement with IBM information systems that allows us to start our systems on their hardware within two weeks in the event of an emergency or disaster. In the wake of the recent terrorist action in the United States, Swets Information Services has demonstrated our resolve to take every possible action to prevent disruption of services under difficult circumstances. We have established the capacity to have our employees work via remote access from different locations should this become necessary again.

h. Sample invoices.

Please see Appendix II.

3. **Pricing and payments.**
a. Provide pricing to include all continuations as listed in Attachment D.

Pricing for all continuations as listed in Attachment D is enclosed (please see Appendix III).

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b. Provide pricing schedule. Comment on your willingness to hold pricing firm through the original three- year contract period and all subsequent renewals.

Virginia Tech's subscriptions will be handled at publishers' list price and may include a service charge. This charge covers ordering, invoicing and publisher payment, claiming, reconciliations, and database management of account changes - all standard serials management services.

Handling charges for the titles list as presented are as follows:

Domestic-Only Titles: plus one percent (1%)
Foreign-Only Titles: minus one percent (-1%)
Combined Domestic and Foreign Titles: zero percent (0%)

Service charges are fixed for the duration of the original three-year contract period and all subsequent renewals; however, if Virginia Tech cancels more than 10% of the contract, Swets reserves the right to re-examine its service charge. When calculating the service charge for libraries in North America, Swets looks at the market as a whole as well as the individual library, taking into consideration the margin Swets makes from the publishers' discounts (where given), the mix of titles, the level of requirements and support required by the libraries. Once set, the service charge is the same on every invoice. The service charge is the only fee on the invoice. Any postage or shipping charges from the publisher are included in the list price of the journal or serial. Swets Information Services does not charge any additional shipping charges. Swets determines a percentage that can be calculated on a line-by-line basis, or a sum total on the last page of the invoice.

Pricing for handling for Virginia Tech Continuations Services as listed in Attachment D. Please see response to Item 3c below for payment plans.

c. Describe any terms and/or discounts applicable for one-line invoice payments, prompt payments, prepayments, deposit accounts, and other payment options.

Swets Information Services pricing is based upon publishers list prices, plus a service charge. Swets manages deep discount pricing if offered, or honors other special negotiated rates, and passes the discount to the client. Swets does **not** add subscription line charges to compensate for publishers who do not provide a discount to subscription agents.

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Swets Information Services payment is net thirty days.

Swets Information Services offers a choice of four invoice plans:

One-Line Invoice Plan
The One-Line Invoice Plan is used with the prepayment option. Each April/May a One-Line Invoice is issued along with an estimate of subscription prices for the coming year using the current titles list.

A definite invoice is issued at the customer's elected invoicing month, but no later than the end of calendar second-quarter. The definite invoice reconciles prepayments, credits, refunds against the actual costs of the subscriptions. The definite invoice uses definite prices from publishers.

The One-Line Invoice Plan offers a basic discount of 0.25% on definite subscriptions prices for prepayment posted before October 1st. An additional discount of 0.25% may be taken for each month prior to October 1st that payment is received. The discount percentage is based on the date the payment is received. The prepayment discount percentages apply to the current subscription year contract period only.

Pre – Payment Received Before:	Pre-Payment Discount*
May 1, 2004	1.50%
June 1, 2004	1.25%
July 1, 2004	1.00%
August 1, 2004	0.75%
September 1, 2004	0.50%
October 1, 2004	0.25%

Main Invoice Plan
The Main Invoice Plan is an estimated invoice amount using the prior year subscription price. The estimated invoices are issued between August and September and show the estimated price for renewal of the subscription.

A reconciliation statement is issued subsequently comparing the estimated invoice amount against the actual current-year amount, and showing a

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balance or credit due. Reconciliation statements are itemized, line-by-line, per serial subscription. Final invoices are issued subsequent to the reconciliation statements.

Bill-Actual Invoice Plan
The Bill-Actual Invoice Plan issues invoices based upon the current-year subscription prices. The first, and largest, Bill-Actual invoice is issued in October. Invoices for additional titles not included in the October invoices are issued monthly.

Firm Fixed-Price Plan
The Firm Fixed-Price Plan issues invoices for an initial subscription contract or for renewals, based on firm subscription prices. No additional invoices or credits are issued. Subscriptions not included in the initial subscription contract, or added subsequent to the renewal period, are invoiced separately.

d. Provide a brief narrative outlining how Virginia Tech's prepayment and/or current subscription monies are insured or otherwise protected.

Swets Information Services can provide customers guarantee for the amount of money they pre-pay for their subscriptions. The bank guarantee will become effective upon receipt of the prepayment funds into one of the bank accounts of Swets Information Services. The bank guarantee will secure the refund of the prepayment in case Swets Information Services is unable to fulfill its contractual obligations.

1) Financial Statement. Audited financial statements are available at any time without charge.

2) Letter of Bank Reference. A Letter of Bank Reference, a statement of financial viability from our bank. There is no charge for this document.

3) Bank Guarantees. There are two forms of bank guarantees - "soft" and "hard." Both would incur charges.

A "Soft" Bank Guarantee is a written agreement that funds are available to return to a customer for non-performance. It requires arbitration to authorize release of funds. There is a service charge of 0.5% of the amount of the guarantee. This rate includes the administrative fee for a letter preparation. This charge would be in addition to customer's current handling charge.

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"Hard" Bank Guarantee is a written agreement that funds are available to return to a customer for non-performance. Funds are returned upon demand of customer with no arbitration required. There is a service charge of 1.0% of the amount of the guarantee. This rate includes the administrative fee for a letter preparation. This charge would be in addition to customer current handling charge.

Because Swets Information Services knows that it is important for our customers to feel secure in payments to publishers, customers can access payment detail information in Dataswets*Connect*. The date the check was sent and cashed by the publishers is available to all customers.

e. Provide a schedule of the payment, invoicing, and renewal cycle.

Swets Information Services' annual renewal cycle begins at the end of April. Customers are sent a checklist of their current subscriptions (a holdings list of all subscription a customer has on order; this report can be broken down by country of origin, publisher, and fund code). Swets will not renew without customer instructions. In October, subscriptions will be renewed with corresponding payments made to the publishers. Line-by-line, itemized invoices will be sent in October/November time-frame. Swets' Subscription System is programmed to monitor and produce, on a weekly basis, all customer titles that need to be ordered and paid per the publishers' criteria. An automated tracking system monitors the placement of renewal orders and outstanding un-remitted checks sent to publishers. As most renewals are sent electronically, publisher response is immediate. Payment is always made to the publisher in time to ensure renewal and continuation of the library's subscription.

4. **Reports.**
a. Samples of all standard reports available as outlined in Section V.(F.)(1 and 2.).

Please see Appendix I for sample reports.

b. Indicate any applicable policies, such as cost or advance time, required for preparation of customized or nonstandard reports.

Swets Information Services is also capable of producing customized reports to match your specific requirements. These reports are based upon your specifications and can be sorted by any subject area included in your Account Profile with Swets Information Services. Customized reports are also available in print and several electronic formats, and can be delivered

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at the frequency of your choice. Most customized reports are available without additional charges. However, should a customized report require special programming or modifications, there may be additional costs associated with the report. Swets Information Services will ensure that the customer is aware of any costs involved.

Costs and preparation times for customized reports are dependent upon the report requested. Swets Information Services makes every attempt to promptly respond to each and every customer request for custom reporting.

5. **References.**
The Offeror shall provide a minimum of four (4) recent references of large academic libraries of a size comparable to the Virginia Tech University Libraries for whom continuations services have been provided.
Include the dates the services were provided, the client's name and address, and the e-mail address and telephone numbers of the individual Virginia Tech has your permission to contact. The Offeror shall provide a list of any contracts for the last five (5) years that were cancelled or from which the Offeror was prohibited from bidding because of lack of performance or because the Offeror defaulted on a contract.

University of Maryland
McKeldin Library
Acquisitions Department
College Park, MD 20742-7011

Contact: Janet Siar
Title: Acting Head of Acquisitions
Phone: (301) 405-9308
E-mail: js116@umail.umd.edu

Dates Services Provided: 2001 to Present.

Massachusetts Institute of Technology
MIT Libraries
77 Massachusetts Ave.
Cambridge, MA 02139-4307

Contact: Kim Maxwell
Title: Serials Librarian
Phone: (617) 253-7028

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E-mail: kmaxwell@mit.edu

Dates Services Provided: 1990 to Present.

Johns Hopkins University
Milton S. Eisenhower Library
3400 N. Charles St.
Baltimore, MD 21218-2683

Contact: Mary Ann Urka
Title: Electronic Resources Coordinator
Phone: (410) 516-8574
E-mail: maurka@jhu.edu

Dates Services Provided: 2001 to Present.

University of Pennsylvania
Van Pelt-Dietrich Library Center
3420 Walnut Street
Philadelphia, PA 19104-6278

Contact: Bob Persing
Title: Head of Serials
Phone: (215) 898-2815
Email: persing@pobox.upenn.edu

Dates Services Provided: 1984 to present.

Old Dominion University
Perry Library
Hampton Blvd.
Norfolk, VA 23539-0256

Contact: Pamela Morgan
Title: Collection Development Officer
Phone: (757) 683-4148
Email: pmorgan@odu.edu

Dates Services Provided: 1990 to present.

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Virginia Commonwealth University
VCU Libraries
901 Park Ave.
P.O. Box 842033
Richmond, VA 23284-2033

Contact: Diane S. Hollyfield
Title: Head, Acquisitions
Phone: (804) 828-1094
Email: dshollyf@vcu.edu

Dates Services Provided: 1990 to present.

Swets Information Services does not possess any contracts that have been cancelled within the last (5) years.

VII. SELECTION CRITERIA AND AWARD

A. Selection Criteria
Proposals will be evaluated by Virginia Tech using the following:

Criteria	Maximum Point Value
1. Ability to provide service	40
2. Pricing and payments	25
3. Reports	20
4. References	15
Total	100

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 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

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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, and is not required to furnish a statement of the reason why a particular proposal was not deemed to be the most advantageous. (Section 2.2-4359(D.), Code of Virginia.) Should Virginia Tech determine in writing and in its sole discretion that only one offeror is fully qualified, or that one offeror is clearly more highly qualified than the others under consideration, 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.

Virginia Tech reserves the right to make multiple contract awards as a result of this solicitation.

VIII. OPTIONAL PRE-PROPOSAL CONFERENCE

An optional pre-proposal conference will be held on March 18, 2004 at 10:00AM in the Virginia Tech Purchasing Department, 270 Southgate Center, Blacksburg, Virginia. The purpose of this conference is to allow potential offerors an opportunity to present questions and obtain clarification relative to any facet of this solicitation.

While attendance at this conference will not be a prerequisite to submitting a proposal, offerors who intend to submit a proposal are encouraged to attend.

Bring a copy of this solicitation with you. Any changes resulting from this conference will be issued in a written addendum to this solicitation.

IX. 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 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

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Virginia Tech Purchasing Department through a written amendment to the contract.

X. ATTACHMENTS
Attachment A- Terms and Conditions
Attachment B - Standard Contract Form
Attachment C – Publication Types
Attachment D – Sample Continuations Listing