



Oklahoma State Office of Management and Enterprise Services

Solicitation #: SW160122

Solicitation for Statewide Contract for Books


Booksource is excited to have the opportunity to provide classroom literature to Oklahoma State Office of Management and Enterprise Services. With 42 years of experience in the trade book market, more than 80,000 active, authentic titles from more than 300 publishers, dedicated customer support and title experts, effective inventory management, and competitive pricing, we are confident that our products, services and experience will enable us to effectively meet your needs and exceed your expectations.

E.4.1. past Performance Information

Booksource currently manages accounts of all sizes, from the biggest districts in the country, to midsize and small districts. Our partnership with the New York City Department of Education is a great example of the breadth of our capabilities. In 2008, Booksource was selected as a primary vendor of trade books for NYCDOE Trade Books Materials Class A (single titles), B (library bound titles) and C (trade book collections) contracts. We were selected based on our expertise in classroom libraries, as well as our operational efficiency in handling all aspects of contracts, including: selection, warehouse and binding services and EDI ordering through FAMIS. Booksource currently has 7,132 active trade book collections approved in the NYCDOE Vendor Portal. In 2010, Booksource was selected as a vendor for the NYCDOE Core Curriculum project. This project resulted in the purchase of thousands of classroom collections throughout all schools in New York City. Booksource NYCDOE Core Curriculum Project sales totaled \$6.8 million in 2010, \$13.5 million in 2011, \$9 million in 2012 and \$31 million in 2013, \$5 million in 2014, and \$11.5 million YTD in 2016. In 2014, Booksource was awarded all three Trade Book Materials contracts (A, B & C), and in 2016 is the leading vendor for classroom collections/libraries, single title book orders, and library bound titles for the NYCDOE.


Booksource is capable of serving mid-size accounts with high levels of customization and customer service support. In addition, we have successfully assisted many districts in implementing reading programs. Here are some examples of our expertise:

- For 27 years, Booksource has provided Chicago Public Schools with both custom classroom library collections and bookrooms. Since 2011, Booksource has worked under contract as a preferred/strategically sourced vendor. Under this contract, Booksource works with individual sites supplying titles and collections from our catalog, and creating custom, leveled, CCSS aligned collections, libraries and bookrooms to meet the unique needs of each site's educators in both



English and Spanish languages. In 2012, Booksource's IT Team implemented a Punch-Out website to integrate with CPS's Oracle iProcurement purchasing system. Users can now select Booksource from the list of vendors maintained in the CPS purchasing system and the Booksource Punch-Out. User authentication is passed from the CPS system to the Punch-Out site via cXML so each purchasing session allows users to view their previously saved lists of books. The Booksource CPS Punch-Out site maintains a list of titles and collections approved by CPS. CPS users are able to browse and search our large catalog of titles and collections and add items to lists for later purchase. Lists of titles can also be created by librarians who are provided with the functionality to send those lists to end users at a specific school. Booksource's combined sales with CPS for 2014 and 2015 were \$2.6 million dollars.

- Booksource has supplied Los Angeles Unified School District with leveled reading collections for over 20 years. Many of the Booksource collections being used by LAUSD literacy instructors are directly from our Leveled Reading Collections Catalog. Booksource also provides many niche collections to schools, such as our Diversity Collections, to address specific curriculum and social needs of LAUSD's student population. In 2015, Booksource worked directly with LAUSD educators to provide the specifically created classroom collections to align to their curriculum agenda throughout the district. The combined sales for 2014 and 2015 were over \$1.3 million.
- In 2015, Booksource provided Beaverton School District's 33 K-5 schools with classroom libraries (approx. 900 classroom libraries), K-2 and 3-5 Bookrooms, and created curriculum specific sets for supplementing the classroom libraries. Each library received book bins for organization, and every book was labeled with leveling and district information. Each classroom library was boxed by teacher, labeled with the teacher's name and grade level, and shipped direct to school sites for easy distribution. The total sales amount for 2014 and 2015 were over \$1.4 million.
- In 2012, Booksource was awarded a contract for Baltimore City Public Schools' K-9 Leveled Reading Classroom Libraries. Booksource enacted an initiative to put a collection of mentor texts for Common Core State Standards Exemplar Units into each classroom, grades 1-5, district-wide. Booksource worked with the district Director Academic Content Liaisons to suggest titles that would fulfill their curricular goals and address the needs of a diverse population of students. This project covered 109 schools and 1,400 classrooms and Booksource was able to effectively distribute leveled titles appropriate to each classroom with sales of nearly \$1 million. As a result of this project Booksource continues to provide classroom literature to Baltimore City Public Schools resulting in \$2.5 million in sales YTD.
- In late 2014, Booksource worked with Oakland Unified School District in implementing balanced literacy district-wide for the 2014-2015 school year. Booksource supplied custom classroom libraries for all classrooms grades K-5 as well as custom novel sets for middle school and high school classrooms. Additionally, Booksource provided custom professional development for the district on best practices for getting the most out of their new classroom libraries and the importance of accountable independent reading. The resulting sales of this project were \$1.2 million.
- From late 2014 to summer 2015, Booksource worked on a project for Dallas Independent School District; custom collections built around the Texas Essential Knowledge and Skills for the district's 6-8 ESL initiative. Booksource's Collection Development team has prepared classroom libraries made up of collections for English Language Arts, Social Studies, Science and Mathematics, each containing fiction and nonfiction High Interest-Low Reading Level titles. The



total dollar amount of this project was over \$800,000. All titles for these projects were sorted into theme and grade level collections, shrink wrapped, boxed by teacher, and delivered by site.

- In August of 2012, Booksource made ancillary text recommendations for Anne Arundel County Public Schools in Maryland's Textbook Adoption Program for the 2013-2014 school year. In a collaborative effort between Booksource's Collection Development and Bids teams, we were able to recommend 35 authentic trade book titles for AACPS's English Language Arts programs for grades 6-12. These titles were carefully selected so that our recommendations met the standards outlined by the Maryland Common Core State Curriculum. Our submitted materials also correlated with other needs of the district's program such as multicultural diversity, reading strategies and differentiation (ESOL, Gifted & Talented, Special Education, etc.). After review of the material submitted by many vendors, AACPS issued several five-year contracts to Booksource in May of 2013 and through August of 2013, and again in May 2015. The contracts issued for our recommended materials have so far resulted in sales of over \$1.9 million.

For all projects, Booksource's experienced title experts and sales support teams worked closely with the district's curriculum departments to ensure all titles, collections, and classroom libraries were designed for easy integration with, and specific correlation to, educators' criteria and standards.

Included with this proposal are Past Performance Surveys completed by customers that Booksource has recently worked with.

E.4.2. Organizational Capacity

Booksource is the premier vendor of K-12 classroom literature collections and support resources. Started in 1973, as Paperback Supply by Sandy Jaffe, Booksource has remained a family owned business, equally owned by Sandy Jaffe, and his three children; Gary Jaffe, Neil Jaffe, and Donna Jaffe. Since 1973, Booksource has established and maintained relationships with the leading publishers of both fiction and nonfiction K-12 literature in order to have the best, authentic literature titles for our collections. Booksource stocks over \$5.8 million dollars inventory, representing more than 36,000 titles from over 300 publishers, with another 1 million+ titles built in our database for special order. Booksource currently employs 226 full time employees.

For 30 years Booksource has been creating collections, classroom libraries, and bookrooms to support the unique curriculum agendas of school districts and state departments of education across the country. We currently offer more than 8,000 collections of varying scope and reading levels—and provide customization opportunities to meet the specific needs of educators working in the classrooms. We can correlate titles and collections according to content area, independent projects, interest levels, reading levels, state standards and more. Booksource is vastly experienced and capable serving the literacy needs of school districts implementing state standard English Language Arts curricula with high levels of customization and customer service support. We have successfully assisted many districts in implementing reading programs.

Business Information

GL group, Inc., dba, Booksource
1230 Macklind Ave., St. Louis, MO 63110
800-444-0435
866-213-9851
bids@booksource.com

Previous Names:

- Paperback Supply: 1974-1987
- The Booksource, Inc.: 1987-2012
- GL group, Inc., dba, Booksource: 2012-present

E.4.3. Technical Proposal

E.4.3.1.

C. Solicitation Specifications

C.2 Categories

Booksource provides the following categories as defined in Solicitation #: SW160122:

C.2.1. General

Including, but not limited to:

- Fiction and nonfiction classroom literature
- Novels
- Leveled readers
- Children's books
- Science books
- Social Studies books
- Spanish language fiction and nonfiction classroom literature
- Big books
- Board books

C.2.5. Multi-Media Products and Recorded Publication Materials

Including, but not limited to:

- Audiobooks
- Audiobooks with accompanying physical book

C.2.7. Reference

Including, but not limited to:

- Dictionaries
- Thesauri

C.3. Account Management

C.3.1.

The Booksource Account Manager for any resulting contract with the Oklahoma State Office of Management and Enterprise Services will be:

Sidney Plaza, Business Development Partner/Midwest
800-444-0435, ext. 217
splaza@booksource.com

C.3.2.

Sidney Plaza will attend meetings at Central Purchasing or at other sites, as requested and determined by the Contracting Officer and be responsible for reports required by the contract and to serve as liaison between the Contractor and Central Purchasing and any other eligible participant.

C.3.3.

Sidney Plaza will be in attendance for all scheduled pre-award meetings. In the event of a conflict, Sean Carosello, the Bids and Contracts Coordinator responding to this solicitation on behalf of Booksource will attend any meetings and repost back to Mrs. Plaza.

C.4. Purchase Process and Pricing

C.4.1.

Sidney Plaza will manage the support team assigned to this account. This team will work with Authorized Users on a day-to-day basis for specific issues relating to delivery timeliness, product quality, returns, and similar concerns.

C.4.2.

Booksource's website and online catalogs will reflect the discount offered herein for all Authorized Users.

C.5. Service Level Requirements and Expectations

C.5.1.1

Booksource has been in business for over 42 years.

C.5.1.2

Booksource is an authorized distributor for all of the products we provide. Upon request, Booksource can identify our account number with all publishers/manufacturers represented in our online or print catalogs.

C.5.1.3

As a distributor, Booksource provides our warranty for all products sold. Booksource will replace all shorted or damaged product at no expense. In the event that Booksource is responsible for any order-fulfillment discrepancy (e.g. damaged books, incorrect titles, etc.), Booksource will issue a return label (call-tag) at no cost to SCASD. If Booksource is not responsible for order-fulfillment discrepancy, but SCASD simply wants to return item(s) for other reasons, the customer will pay for shipping/handling per shipping method rates. Items that have been altered by customer are non-returnable (e.g. re-bound, stamped, labeled, etc.). Special order titles are non-returnable. The total for returned items will be subtracted from the invoice. When necessary (e.g. invoice has already been paid, customer prepaid with a credit card, etc.), Booksource can also issue a refund for returned items via check, credit towards future purchase, or credit back to credit card. Any discrepancies must be reported within 30 calendar days ARO.

C.5.1.4.

Booksource will honor the price listed on the purchase orders submitted by Authorized Users, as agreed upon by both parties, regardless of price changes made by the publisher/manufacturer between the time of order and delivery.

C.5.1.5.

Booksource will not invoice service fees or additional costs to the Authorized Users during the term of the contract. Booksource has no minimum order requirements, and all orders are subject to free standard shipping.


C.5.2. Desirable Service Level Expectations

C.5.2.1. Response Time

Booksource has a dedicated internal Customer Care team assigned to each account. These teams of specialists have been trained in all aspects of operational management and are available to enter orders and answer all questions within 24 hours. Authorized Users can reach a member of this team Monday through Friday from 8 a.m. to 5 p.m., CST. We believe strongly in personalized service. For this reason, our 800 number is operated in-house by a live operator from 8 a.m. to 5 p.m., CST.

C.5.2.2. Fill Rate

Booksource keeps in stock more than 36,000 K-12 titles, representing more than \$5.8 million in inventory, in our warehouse. Our "in stock" percentage averages 98.5%. We use Effective Inventory Management (EIM) software as a component of our buying process, which allows us to maintain the proper amount of inventory available to customers. Safety stock amounts, delivery times from publishers, spike orders, and all other factors are considered in the process for forecasting and purchasing. Purchases are made to publishers via EDI and other electronic formats. We proactively place orders to most publishers on a daily basis, which ensures faster turnaround and higher fill rates for our customers. All inbound shipments from publishers are received and shelved within 48 hours. All pick tickets are picked within 48 hours. Booksource logs any errors reported by customers and consistently maintains a 100% accuracy rate on more



than 99% of all orders. Booksource is capable of shipping classroom collections 100% complete. However, as a wholesaler there are times when books within a collection are unavailable from the publisher. Typical reasons include out of print, out of stock indefinitely, out of stock with no due date and out of stock with a due date. Booksource's experience working with these challenges has led us to offer a number of solutions to maintain 100% complete delivery, including predetermined alternate title substitutions, or title cancellation of unavailable books. Booksource works closely with every end user to meet their individual order completion needs.

C.5.2.3. Invoice Accuracy

All shipped orders are accompanied by an itemized packing list. Once an order has shipped, its invoice is generated overnight and mailed the next day. An e-mail notification is sent to the e-mail on file for a particular order once said order has shipped. All invoices and packing lists contain detailed information to ensure 100% accuracy.

C.5.2.4. Delivery Standards

In stock items will be delivered 7-14 days ARO. Booksource will work directly with all Authorized Users to best meet their delivery needs and ensure delivery dates around any State holidays, national holidays, or any other disruptions of the Authorized Users' regular hours of operation. Booksource ensures that delivery date standards are met more than 97% of the time.

C.5.2.5. Non-Delivery


For out of stock items, customers have the option to allow for backorders, substitute backordered titles, or to have an order held until all items are in stock. Booksource uses a notification system that is sent electronically to the email address provided on the Purchase Order. If no email address is provided, the system will default to fax or written notifications. Notifications are sent upon order receipt and order completion. Initial orders will ship within seven to ten business days upon Purchase Order placement, while backordered items, if any, will ship complete within 30-45 days, pending publisher availability. In the event that a title(s) is out of stock beyond the 30-45 day period, the customer will be notified and has the option to cancel or substitute title(s).

C.5.2.6. Overall Customer Satisfaction

If awarded, Booksource will develop a plan to conduct a quarterly survey of end-users to determine the level of customer service satisfaction experienced by Authorized Users, and should conduct such a survey upon request from the Contracting Officer.

C.5.2.7. Ordering Methods

Authorized Users can order by phone (800-444-0435), mail (1230 Macklind Ave., St. Louis, MO 63110, fax (800-647-1923), e-mail (service@booksource.com) or directly from Booksource's website, www.booksource.com. For the order to be processed, Booksource requires either a purchase order, check, credit card number, or wire transfer. Searching for titles online is extremely easy with Booksource's Advanced Search feature. Educators are able to search through thousands of titles from 300 publishers with 13 different filter options — one of the most advanced book title searching for educators currently on the web. Booksource.com



provides a comprehensive list manager for educators to organize their school's book lists. Purchasing departments can use the wish list feature and save hundreds of lists of books, helping immensely with order organization. While searching titles and creating orders, Authorized Users will be able to see publisher list price and their discounted Booksource price side by side.

Authorized Users can view their order history by clicking on "My Account" in the upper right hand side of Booksource's homepage. Here they will see the option to either manage their user information (display username and e-mail address, change password, update e-mail address, review Booksource account number and billing/shipping addresses) or view order information. The view order option allows members to research open and shipped orders, check status of invoices, and gives the option to fax or e-mail open orders or invoices. Members can search orders in their history by either:

- Purchase order
- Invoice number
- Booksource sales number
- Title
- ISBN

Once a search criterion is selected, members can view all applicable orders by any date range they choose. Each order shows itemized details with tracking information and shipping status. Members may track orders through the "My Account" feature of our website; our shipping systems are integrated with UPS tracking information and this information may be searched by search options previously outlined for order history. Members can access their tracking information on our website, or it be accessed for members of our Customer Care Department upon request.

C.5.2.8. Payment Options

Booksource accepts check, electronic funds transfer, and State authorized P-cards.

C.5.2.9. Freight Policy


All Booksource shipments are F.O.B. Destination to the specified location, with inside delivery if requested. Small orders are delivered UPS ground. Large orders are delivered by UPS Freight, ABF Freight or R&L Carriers.

C.5.2.10. Rush Delivery

Booksource can provide 24 hour emergency/rush delivery requiring special shipping and handling at the Authorized Users' expense. Booksource does not pay rush shipping (overnight, two day air, etc.) unless Booksource is at fault for the urgency of the item(s).

C.5.2.11. Shipping

One of the many customization options Booksource provides is our set sorting, labeling, and boxing service. Every collection, bookroom, or classroom library Booksource ships is sorted and



packaged to ensure easy delivery, receipt and distribution. Books can be labeled with information such as level (Lexile, A-Z, etc.), teacher's name, classroom number, etc. Once titles are separated into sets, they are shrink-wrapped or bagged (depending on size of books or Authorized User specifications) and the set is labeled with its name or any other information requested by the customer. Sets are then boxed by teacher, classroom, and grade level – again, whatever the District chooses that would make distribution easiest upon receipt. Boxes are then labeled with the information needed based on the sorting criteria. When an Authorized User receives an order from Booksource, each step of unpacking contains the necessary information to make it as easy as possible to get the materials where they need to be, organized in the best way to be used in the classroom. Booksource uses recycled shipping materials. Booksource ships no hazardous materials.

C.5.2.12. Return of Product

In the event that Booksource is responsible for any order-fulfillment discrepancy (e.g. damaged books, incorrect titles, etc.), Booksource will issue a return label (call-tag) at no customer cost. Items that have been altered by customer are non-returnable (e.g. re-bound, stamped, labeled, etc.). Special order titles are non-returnable. The total for returned items will be subtracted from the customer's invoice. When necessary (e.g. invoice has already been paid, customer prepaid with a credit card, etc.), Booksource can also issue a refund for returned items via check or credit card. Any discrepancies must be reported within 30 calendar days ARO. Booksource will make arrangements for the return of the product within twenty (20) days of written notification by the Authorized User.

C.5.2.13. Returns Due to User Error


Typically, if Booksource is not responsible for order-fulfillment discrepancy, but the customer simply wants to return item(s) for other reasons, the customer will pay for shipping/handling per shipping method rates, unless there are extraordinary circumstances that lead to an Authorized User's error. Each specific situation will be handled accordingly as arrangements are made between Booksource and the Authorized User.

C.5.2.14. Post-Order Customer Service

Booksource has a dedicated internal Customer Care team assigned to each account. These teams of specialists have been trained in all aspects of operational management and are available to enter orders and answer all questions within 24 hours. Authorized Users can reach a member of this team Monday through Friday from 8 a.m. to 5 p.m., CST. We believe strongly in personalized service. For this reason, our 800 number is operated in-house by a live operator from 8 a.m. to 5 p.m., CST. Under any resulting contract, Authorized Users will have primary and secondary Customer Care Specialists assigned specifically to their account.

C.5.2.15. Price Verification

All Booksource quotes reflect both the publisher/manufacturer list price and the Authorized User's discounted price. The discount that will be provided to Authorized Users under any resulting contract will be built into their internal customer number to ensure that it



automatically applied to every order. Publisher/manufacturer list prices are updated daily through direct feeds to publisher databases.

C.5.2.16.

Booksource will offer all rebates and special offers made available by publishers to distributors that are applicable to Authorized Users, in addition to contracted pricing.

C.5.2.17.

Booksource guarantees its products to be free from defects in materials and workmanship, given normal use and care, over a minimum of the manufacturer's warranty period. Booksource agrees to replace without charge (including freight both ways) to Authorized Users any product or part thereof that proves to be defective or fails within the manufacturer warranty period.

C.5.2.18. Notification of Back Orders

For out of stock items, customers have the option to allow for backorders, substitute backordered titles, or to have an order held until all items are in stock. Booksource uses a notification system that is sent electronically to the email address provided on the Purchase Order. If no email address is provided, the system will default to fax or written notifications. Notifications are sent upon order receipt and order completion. Initial orders will ship within seven to ten business days upon Purchase Order placement, while backordered items, if any, will ship complete within 30-45 days, pending publisher availability. In the event that a title(s) is out of stock beyond the 30-45 day period, the customer will be notified and has the option to cancel or substitute title(s).

C.5.2.19. Receiving Procedures and Order Inspection

Booksource agrees to conform to State receiving procedures and order inspection procedures.


C.5.2.20. Invoice Requirements

Booksource can meet the invoice requirements as defined by Solicitation # SW16012.

C.5.2.21. Complaint Resolution Procedure

Booksource has a dedicated internal Customer Care team assigned to each account. These teams of specialists have been trained in all aspects of operational management and are available to enter orders and answer all questions within 24 hours. Authorized Users can reach a member of this team Monday through Friday from 8 a.m. to 5 p.m., CST. Under any resulting contract, Authorized Users will have primary and secondary Customer Care Specialists assigned specifically to their account. Any complaints or problems an Authorized User may have with a Booksource product or service can be directed to their Customer Care Specialist who will work directly with the Authorized User to ensure the best possible resolution.

Over the past 42 years, Booksource has built a reputation for quality service to our customers. The Golden Rule (treat each other and customers as we would want to be treated) is a part of everything we do. We have established a Golden Rule Committee (GRC) dedicated to making sure the Golden Rule is at the heart of our everyday business practices. The GRC is made up of volunteer employees from each department. In addition to the Golden Rule, we always strive to



create Moments of Truth. A Moment of Truth is any time a customer comes in contact with our organization and judges the quality of service provided. A Moment of Truth happens when a customer looks at one of our advertisements, opens one of our shipments, speaks to one of our employees, or walks in our front door, etc. Every Moment of Truth is related to an individual—whether it is direct contact over the phone or indirect contact (for example, when a receiving clerk 1,000 miles away opens a box from us). The companywide focus is Exceptional Customer Experience and how each of us performs our duties will ultimately create a Moment of Truth for one of our customers. Our success as a company is a direct reflection of the superior quality of service we provide.

C.5.2.22. Catalogs

Booksource will provide hard copies or a link to our website of the most current catalog to each Authorized User upon request. As new catalogs are published, Booksource will provide Contracting Officer with an electronic copy of each new catalog within five (5) business days of publication. An electronic copy of each Booksource catalog, as well as a link to our complete online catalog, is included with our response to Solicitation # SW16012.

E.4.3.2.

An electronic copy of each Booksource catalog is included with our response to Solicitation # SW16012. Booksource's complete online catalog can found at www.booksource.com.

E.4.4. Price Response

E.4.4.1.

Booksource's completed Attachment C Bid Sheet is included with our response to Solicitation # SW16012.