**INSTRUCTIONS FOR ORDERING FEDLINK BOOKS**

This form requests information about your agency’s books requirements. Based on the requirements that you identify, FEDLINK will give its book vendors a fair opportunity to fill your order. Once a FEDLINK contracting officer has selected a vendor or vendors to fill your order, FEDLINK will establish a customer specific order with the selected vendor(s) with a guaranteed minimum and maximum quantity of supply. Your agency’s FEDLINK designated Ordering Officer shall identify the specific books that are required and make individual purchases within the scope of the customer specific order, the FEDLINK interagency agreement, and Ordering Officer authority.

**BASIC INFORMATION**

|  |
| --- |
| **Date completed:** |

Please provide the information requested below regarding your agency.

Email the completed form with **subject line:** **“[FEDLINK ID] book requirements”,** for example, ***ABCD book requirements*** to  **[FEDLINKBooks@loc.gov](mailto:FEDLINKBooks@loc.gov).**

|  |  |
| --- | --- |
| FEDINK ID: |  |
| Agency Name: |  |
| Contact Name and title: |  |
| Phone # and Email: |  |
| Email: |  |
| Agency Ordering Officer, name and title |  |
| Phone# and Email: |  |
| Shipping Address: |  |
| ***If you have multiple shipping addresses, or are ordering for different locations please include them here:*** | |

**BASIC REQUIREMENTS**

**Please identify the amount of money you anticipate spending on book purchases in the upcoming year.**

|  |  |
| --- | --- |
| **Anticipated Total Dollar Value of Annual Book Purchases:** | $ |
| **B.1. Firm Orders** - A one-time order for a specific title or titles for a specific number of copies. | $ |
| **B.2. Approval Plan Services** – Vendor supplies books and library publications to the customer in accordance with a customer-specific collection ordering profile. The approval profile typically specifies the library’s subject focus areas and collection intensity (e.g., comprehensive), and other collection parameters such as format, language, place of publication and price range. Approval plans are intended to improve library efficiency and effectiveness by providing important pre-purchase information concerning new and/or forthcoming titles and eliminating the need for libraries to place individual orders in either routine or esoteric collection areas. | $ |
| **B.3. Leasing Plan Services** - Vendor will lease or license non-serial publications to customers in response to title selection or according to a customer profile. Customer leases publications from the supplier instead of buying them, and retains an option to purchase leased items at a reduced price when the term of the lease is over. The leasing plan is a mechanism for a library to expand the resources available to its users by obtaining popular titles as needed, without having to buy multiple copies for the permanent collection. Leasing also extends the shelf life of heavily used titles. | $ |
| **B.4. Technical and/or Ordering Processing Services** – Vendor may provide technical processing only for materials supplied under this contract, performing physical processing or cataloging to supply materials to the customer in shelf-ready condition. | $ |
| **B.4. Collection development services** – Vendor may provide collection analysis or assessment, collection development, or collection management tools for the customer or may provide the customer with online access on the vendor's system. The vendor will provide training in its collection analysis/assessment, collection development, or collection management system. | $ |
| **Anticipated amount of your first Books order under this contract:** | $ |

**B.1. FIRM ORDERS**

**B.1.1. Special Technical Requirements for Firm Orders:**

|  |
| --- |
| **Example 1:** Subject based, source based, country or region based, language based, etc.  **Example 2:** Our library sets up slip profiles for new title notifications (by subject and non-subject parameters) but are only delivered the slips (i.e. the books are not auto ordered based on the profile). We then go through the slips and select titles one-by-one to firm order.    **Example 3:** Our library requires multi-tiered acquisition workflows within the ordering system; Book selectors can only select titles and submit for review by a “approver” who is a tier 2 review and approves selections for purchase. Then the approver sends to the acquisitions department who actually places the order.  **Please describe any special requirements you have for firm orders in this space:** |

**B.1.2. Subject Specializations**

Please see the categories listed below. You should identify the percentage of firm order books in each category that you anticipate purchasing. The sum of all specializations should total 100%.

You should also identify special binding requirements.

|  |  |  |
| --- | --- | --- |
|  | **DESCRIPTION – Subject Specializations** | **% of total orders** |
| **1101** | **General** |  |
|  | Special binding requirements: |  |
| **1102** | **Juvenile and Young Adult** |  |
|  | Special binding requirements: |  |
| **1103** | **Business, Economics, and Finance** |  |
|  | Special binding requirements: |  |
| **1104** | **Legal Publications** |  |
|  | Special binding requirements: |  |
| **1105** | **Medical and Allied Health Publications** |  |
|  | Special binding requirements: |  |
| **1106** | **Scientific/Technical Publications** |  |
|  | Special binding requirements: |  |
| **1107** | **Social Science/Humanities** |  |
|  | Special binding requirements: |  |
| **1108** | **Military** |  |
|  | Special binding requirements: |  |

**B.1.3. Format or Source Specializations**

Please see the categories listed below. You should identify the percentage of firm order books in each category that you anticipate purchasing. The sum of all specializations should total 100%

You should also identify special binding requirements, and indicate whether online ordering, rush or special delivery, support services or digital content access/maintenance is required.

|  |  |  |
| --- | --- | --- |
|  | **DESCRIPTION - Format or Source Specializations** | **% of total orders** |
| **1200** | **FORMAT OR SOURCE SPECIALIZATIONS** |  |
| **1201** | **Trade, Trade Paperback** |  |
|  | Special binding requirements: |  |
| **1202** | **Textbook, Textbook Paperback** |  |
|  | Special binding requirements: |  |
| **1203** | **Mass Market Paperback** |  |
|  | Special binding requirements: |  |
| **1204** | **Reference** |  |
|  | Special binding requirements: |  |
| **1205** | **Reprints/Back Issue Sets** |  |
|  | Special binding requirements: |  |
| **1206** | **Audio-Visual** (Specify format(s), e.g., DVDs, Blu-ray, music CDs) |  |
|  | Special binding requirements: |  |
| **1207** | **Multimedia** (Specify format(s), e.g., Kits, Video Games) |  |
|  | Special binding requirements: |  |
| **1208** | **Spoken Word** |  |
|  | Special binding requirements: |  |
| **1209** | **Non-English Language** (Specify language(s)) |  |
|  | Special binding requirements: |  |
| **1210** | **Out of Print** |  |
|  | Special binding requirements: |  |
| **1211** | **Association, Society Presses** |  |
|  | Special binding requirements: |  |
| **1212** | **Foreign Presses** |  |
|  | Special binding requirements: |  |
| **1213** | **Government Documents** |  |
|  | Special binding requirements: |  |
| **1214** | **Small Presses** |  |
|  | Special binding requirements: |  |
| **1215** | **University Presses** |  |
|  | Special binding requirements: |  |
| **1216** | **Electronic Books** (Specify format or method of access, e.g., CD, downloadable, streaming) See also Digital Content Access or Maintenance, below |  |
|  |  | **Y or N** |
| **1300** | **ORDERING** |  |
| 1301 | Online Ordering |  |
| **1400** | **DELIVERY** |  |
| 1401 | Rush delivery |  |
| 1402 | Special delivery |  |
| **1500** | **SUPPORT SERVICES** |  |
| 1501 | Additional Mini-Network Services |  |
| **1600** | **DIGITAL CONTENT ACCESS OR MAINTENANCE** |  |

**B.2. APPROVAL PLAN SERVICES**

Please see the approval plan profiles listed below. You should identify the percentage of approval plans in each profile that you anticipate purchasing. You should also identify whether digital content access or maintenance is required, and note whether single or multiple copies are needed. If multiple copies are needed, you should identify the number of multiple copies that are required (if known).

**B.2.1. Approval Plan Type and Features**

|  |  |  |
| --- | --- | --- |
|  | **DESCRIPTION - Approval Plan Services** | **% of total orders** |
| **2101** | **Subject Based Profile** –enter details about subject areas here: |  |
| 2101.1 | Single copy |  |
| 2101.2 | multiple copies |  |
| **2102** | **Source Based Profile** –enter details about sources here: |  |
| 2102.1 | single copy |  |
| 2102.2 | multiple copies |  |
| **2103** | **Country or Region Based Profile** –enter details about countries/ regions here: |  |
| 2103.1 | single copy |  |
| 2103.2 | multiple copies |  |
| **2104** | **Language Based Profile** –enter details about languages here: |  |
| 2104.1 | single copy |  |
| 2104.2 | multiple copies |  |
| **2105** | **Other Profile (Specify)** –enter details here: |  |
| 2105.1 | single copy |  |
| 2105.2 | multiple copies |  |
|  |  | **Y or N** |
| **2106** | **Digital Content Access or Maintenance** |  |
| **2107** | **Online Selecting** |  |

You should also identify the length of the plan, the frequency by which you would like to receive materials, and any technical requirements.

|  |  |
| --- | --- |
| **Length of the Plan** (for example, 12 months, annual) |  |
| **Frequency by which you’ll receive materials** (for example, monthly) |  |

**B.2.2. Special Technical Requirements for Approval Plan Services**

|  |
| --- |
| **Example:** Technical processing and cataloging required on approved materials: MARC record; spine label, barcode, polyester book jackets.  **Please describe any special requirements, including any cataloging and physical processing you have for firm orders in this space:** |

**B.3. LEASING PLAN SERVICES**

Please see the leasing plan publication categories and types of leasing plans listed below. You should identify the percentage of books in each leasing plan publication category and type of leasing plan that you anticipate purchasing. You should also identify whether digital content access/maintenance is required, and note whether single or multiple copies are needed. If multiple copies are need, you should identify the number of multiple copies that are required. You should also indicate whether you require rush or special delivery, additional support services, or digital content access or maintenance. If you require additional support services, please briefly note what those services are.

|  |  |  |
| --- | --- | --- |
|  | **DESCRIPTION - Leasing Plan Services** | **Y or N** |
| **3000** | **LEASING PLAN PUBLICATION CATEGORIES** |  |
| 3001 | **Subject or Genre Based** – enter details about what genres or subject areas here: |  |
| 3002 | **Format or Source Based** – enter details about what formats you want here, e.g., DVDs, audio books on CD, music CDs, downloadable e-books, graphic novels, etc. |  |
| 3003 | **Profile Based** – enter details here, e.g., Adult, Young Adult, Juvenile, etc. |  |
| **3100** | **TYPES OF LEASING PLANS** | **Y or N** |
| 3101 | Title Selection Leasing Plan |  |
| 3102 | Profile Leasing Plan |  |
| 3103 | Usage Based Acquisition Plan |  |
| 3104 | Option to Purchase |  |
| 3104.1 | No Returns |  |
| 3105 | Discount off net price |  |
|  |  | **Y or N** |
| **3200** | **DELIVERY** |  |
| 3201 | Rush delivery |  |
| 3202 | Special delivery |  |
| **3300** | **SUPPORT SERVICES** |  |
| 3301 | Additional Support Services |  |
| **3400** | **DIGITAL CONTENT ACCESS FEE/ MAINTENANCE FEE** |  |

You should also identify the size of the plan, length of the plan, the frequency by which you would like to receive materials, and any technical requirements.

|  |  |
| --- | --- |
| **Size of the Plan** (number of titles) |  |
| **Length of the Plan** (for example, 12 months, annual) |  |
| **Frequency by which you’ll select materials** (for example, monthly) |  |

**Special Technical Requirements for Leasing Plan Services:**

|  |
| --- |
| **Example:** Technical processing and cataloging required on approved materials: MARC record; spine label, barcode, polyester book jackets.  **Example:** 5 sites  **Please describe any special requirements, including any cataloging and physical processing you have for firm orders in this space:** |

**B.4. TECHNICAL AND/OR ORDERING PROCESSING SERVICES for FIRM ORDERS**

Please see the technical and ordering processing services listed below. You should identify the basic technical processing services and cataloging processing that you anticipate using along with an estimated number of units, devices, kits, coverups (jackets), reinforced binding records, sets or volumes. You should also note whether you require complete technical processing, computer-based order processing, collection development services or other related services. If you require other related services, please briefly note what those services are.

|  |  |  |
| --- | --- | --- |
|  | **DESCRIPTION - Technical and/or Ordering Processing Services** | **Y or N**  **or**  **Quantity** |
| **4100** | **BASIC TECHNICAL PROCESSING** Specify types/grades of materials required. |  |
| 4101 | Physical Processing (per unit) |  |
| 4102 | Circulation Kit (per kit, for example, barcode, spine label, pocket, and charge-out card) |  |
| 4103 | Barcode labels (per set) |  |
| 4104 | Security Device (per device) |  |
| 4105 | Coverups (per coverup) |  |
| 4106 | Binding Reinforcements (per volume) |  |
| 4107 | Other Physical Processing Options (Specify) |  |
| **4200** | **CATALOGING PROCESSING** |  |
| 4201 | Cataloging Data in Electronic Form (per record) |  |
| 4202 | Cataloging in Print Form (per card set) |  |
| 4203 | Other Cataloging Processing Options (Specify) |  |
| 4203.1 | Set holdings in OCLC WorldCat |  |
| **4300** | **COMPLETE TECHNICAL PROCESSING** (Specify) |  |
| **4400** | **COMPUTER-BASED ORDER PROCESSING** |  |
| **4500** | **COLLECTION DEVELOPMENT SERVICES** |  |
| **4600** | **OTHER RELATED SERVICES** (Specify) |  |

**Special Technical Requirements for Technical and/or Ordering Processing Services:**

|  |
| --- |
| **Example:** Technical processing and cataloging required on approved materials:   * MARC record * Set holdings in OCLC * LC Classification spine label, affixed 1” from bottom * Barcode label * Polyester book jackets for hard cover books. |

Please use the space below for additional information: