The University of Iowa

Request for Proposal
Number 10060

for

Regents Library Bindery Services
at
The University of Iowa
Iowa City, Iowa

Iowa State University
Ames, Iowa

The University of Northern Iowa
Cedar Falls, Iowa

The University of Iowa
Purchasing Department
202 PCO
Iowa City, Iowa 52242-2500

May 2011
# TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Introduction</td>
<td>3</td>
</tr>
<tr>
<td>2</td>
<td>Instructions to Vendors</td>
<td>6</td>
</tr>
<tr>
<td>3</td>
<td>Specifications / Vendor Requirements</td>
<td>8</td>
</tr>
<tr>
<td>4</td>
<td>Scope of Work / Vendor Questions</td>
<td>24</td>
</tr>
<tr>
<td>5</td>
<td>Evaluation Criteria / Method of Award</td>
<td>29</td>
</tr>
<tr>
<td>6</td>
<td>Terms and Conditions</td>
<td>30</td>
</tr>
<tr>
<td>7</td>
<td>Form of Proposal</td>
<td>36</td>
</tr>
<tr>
<td>A</td>
<td>Proposal Certification</td>
<td>43</td>
</tr>
<tr>
<td>B</td>
<td>Intent and Question Submission Form</td>
<td>44</td>
</tr>
<tr>
<td>C</td>
<td>Proposal Compliance Form</td>
<td>45</td>
</tr>
<tr>
<td>D</td>
<td>Proposal Pricing Schedule</td>
<td>46</td>
</tr>
<tr>
<td>E</td>
<td>Contract Performance and Payment Bond Form</td>
<td>50</td>
</tr>
<tr>
<td>I</td>
<td>Binding Statistics. 1996/97 through 2002/03</td>
<td>52</td>
</tr>
<tr>
<td>II</td>
<td>Libraries Authorized Representatives</td>
<td>53</td>
</tr>
<tr>
<td>III</td>
<td>Specifications Limited to a Single Library</td>
<td>54</td>
</tr>
</tbody>
</table>
SECTION 1 INTRODUCTION

The University of Iowa (hereafter, The University / University) located in Iowa City, Iowa, acting as lead agency for Iowa Board of Regents Institutions including, Iowa State University (ISU), Ames, Iowa and The University of Northern Iowa (UNI) in Cedar Falls, Iowa, desires to obtain proposals from qualified Binding Companies (hereafter Binder / Vendor) to serve the Institutions in a “Regents Binding Program” for The University of Iowa Libraries, The University of Iowa Law Library, Iowa State University Library and The University of Northern Iowa Libraries.

It is essential for the Binder to understand the importance of providing service of the highest quality in meeting the expectations of the Regent Institutions. Although we have listed general criteria that will be used in our final evaluation, we do not intend these criteria to limit your creativity in preparing a proposal you believe will accomplish our goals of obtaining excellent commercial bindings for library materials, cost containment for binding expenses and the highest possible level of service for our customers. The specifications and administrative requirements outlined herein are intended to serve only as a general guideline outlining the minimum level of service required from each proposal. Each Vendor is expected to submit a complete and detailed proposal which adequately describes the advantages and benefits which the Regent institutions would realize by acceptance of its proposal.

REGENTS INSTITUTIONS

A. The University of Iowa and University of Iowa Libraries

The University of Iowa is a broad-based public university of international stature with an enrollment of over 30,000 students. The University of Iowa employs approximately 1700 Faculty members, 13,000 professional, scientific, and support staff members.

University of Iowa Libraries has a collection of over four million volumes and volume-equivalents, and a materials budget in excess of $12.4 million. Libraries add more than 160,000 volumes annually and receive in excess of 11,000 print serial titles. The Libraries' Preservation Department devotes 3 FTE of permanent staff to binding operations, and binds approximately 20,000 volumes annually.

B. The University of Iowa Law Library

The University of Iowa Law Library has one of the largest and finest collections of print, microform, and electronic legal materials in the United States. With a collection of over 1,298,600 volumes and volume equivalents, the University of Iowa Law Library is the largest public academic law library in the country and has the second largest collection among all American law school libraries. The Law Library adds 7,000 titles annually and maintains approximately 8,000 standing orders for serials and continuations. The Law Library employs a binding staff of 1.3 permanent FTE and sends an average of 4,600 volumes to the commercial bindery annually.

C. Iowa State University and Iowa State University Library, Ames, Iowa

Iowa State University (ISU) is a public land-grant institution serving the people of Iowa, the nation, and the world through its interrelated programs of instruction, research, extension, and professional service. Its broad-based academic programs reflect an institutional emphasis upon areas related to science and technology. Student enrollment approaches 28,700. ISU employs 1634 faculty, 2598 Professional & Scientific support staff, 1613Merit system support staff and approximately 2654 student assistants/hourly employees.
The Iowa State University Library supports a collection of over 2.6 million volumes and volume equivalents, receives 98,610 journals, and employs a binding staff of 1.25 FTE. An estimate for annual library binding is 12,000 volumes based on current trends.

D. The University of Northern Iowa and University of Northern Iowa Library, Cedar Falls, Iowa

Founded in 1876, the University of Northern Iowa (UNI) has fostered a premier learning and teaching environment. While emphasizing undergraduate education, UNI offers graduate programs at the master’s, specialist’s and doctoral levels. UNI has a faculty approaching 800 with a student enrollment of over 13,000 and was ranked second among Midwest top public universities in U. S. News and World Report for seven consecutive years.

The UNI Rod Library has a collection of more than 1,000,000 volumes, and a materials budget of $1.9 million. The Library adds 14,000 titles annually and maintains 5,500 subscriptions and standing orders. Employing a binding staff of 1.6 FTE, the Library sends on average approximately 4,800 volumes for binding annually.

BACKGROUND INFORMATION

Several years ago, the Regent Institutions were charged by the Board of Regents to develop and implement Joint Regent Contracts for like commodities through competitive bid or proposal processes. To date approximately twenty of these types of contracts exist which bring greater flexibility for department customers and provide additional significant savings for each institution which if purchased separately could not be realized. One of the initial joint Regent contracts developed was for Library Binding Services, now referred to as Library Bindery Services.

The current contract for these services shall expire September 30, 2011 with a new contract, resulting from this Request for Proposal, becoming effective on October 1, 2011.

The binding budgets of the Libraries are annually determined but are expected to remain relatively stable over the life of the contract resulting from this Request for Proposal.

The estimated annual expenditures for Regent institutions for bindery services including, but not limited to, library binding, reformatting, and conservation are approximately $295,000. Expenditures for each institution are as follows:

- The University of Iowa Libraries     $120,000
- The University of Iowa Law Library       $30,000
- Iowa State University Library         $115,000
- The University of Northern Iowa Libraries    $30,000

INTENT

The Regent institutions expect that the Binder shall provide superior service in meeting their needs and expectations. The proposed contract includes the following assumptions:

- That the Binder will provide binding and re-binding services that meet the ANSI/NISO/LBI Z39.78-2000 Standard for Library Binding or NISO/LBI Standard and any subsequent
modifications. It is expected that the selected Vendor will provide binding and re-binding of books, periodicals, pamphlets, reports, report sheets, newspapers, theses and any other materials not otherwise classified that are to be placed in permanent covers.

- That all materials furnished in fulfilling any binding contract shall be of the highest quality as measured by the highest standards of the trade.

- That the Binder shall provide for the containment of costs associated with various binding requirements for each Regent institution.

- That the Binder shall provide an online record management system as well as extensive management reporting capabilities.

- That the Binder will provide rapid shipment turn-around service (Library to Binder to Library) that will allow the Libraries to meet user demand for on-site access to Library materials. With the current Binder, shipment turn-around is accomplished within three weeks.

- That the Binder shall provide services which measure and report customer satisfaction on a regular basis.
SECTION 2  INSTRUCTIONS TO VENDORS

2.1 The University is requesting proposals from qualified Binders capable of servicing the binding needs of the Regent Institutions. Proposals must be submitted based on the instructions and information contained in this section. This Request for Proposal does not commit the Regent institutions to award a contract or to pay any costs incurred in the submission of proposals, or costs incurred in making necessary studies for the preparation thereof or to procure or contract for services or supplies.

2.2 When this Request for Proposal is awarded, the resultant Bindery Services agreement will begin on or about October 1, 2011 and remain in effect for the succeeding thirty-six (36) months, through and including, September 30, 2014, unless earlier terminated. Thereafter, the contractual agreement may be extended for two (2) additional twenty-four (24) month periods, each upon the written mutual consent of the parties, for a potential seven year agreement. Prices submitted by the Binder shall remain firm for the initial contract period of thirty-six (36) months and shall not be modified. See Section 6.12 for additional details.

2.3 Due date for submission of proposals is 3:00 P.M., CDT, July 13, 2011. Proposals should be addressed to:

RFP # 10060
Sherri Dusenbery
University of Iowa Purchasing Department
202 PCO
Iowa City, IA  52242-2500

Proposals should be submitted in both of the following formats:
1. One signed paper copy mailed to the address shown above. RFP # 10060 must be referenced on the envelope or package. This will serve as the original official copy.
2. One electronic copy either sent via email to: sherri-dusenbery@uiowa.edu or provided on CD in PDF format. The CD should be sent by mail with the original paper copy. The electronic copy will be shared with the review committee and is being requested in lieu of additional paper copies.

Unnecessarily elaborate brochures and other presentations beyond that sufficient to present a complete and effective proposal are neither necessary nor desired.

2.4 Vendors must respond to each of the labeled points in Section 4, Scope of Work / Vendor Response and Section 7, Form of Proposal and provide all information requested. Vendors must provide the pricing information requested in Attachment D, Proposal Pricing Schedule.

2.5 If the Vendor fails to provide any of the requested information, the Universities may, at their sole option, ask the Vendor to provide the missing information, or evaluate the proposal without the missing information.

2.6 Vendors must submit samples of work as detailed in Section 3.1 and 7.8.

2.7 The proposal must be signed in Section 7.10 by an officer or agent of the Vendor authorized to submit quotations. Vendors must also complete the Proposal Certification Form, Attachment A. All corrections shall be initialed by the person signing the proposal.

2.8 Any vendor submitting a proposal accepts all the terms, conditions and requirements in this Request for Proposal unless otherwise noted on Proposal Compliance Form, Attachment C.
2.9 Vendors shall advise of their intent to respond to this RFP and submit any questions relating to it by returning the Intent and Question Submission Form, Attachment B via fax to the attention of Sherri Dusenbery, University of Iowa Purchasing Department, Fax Number 319-353-2358. Due date for submission of the form is June 11, 2011. Questions submitted after that date will be answered only as time permits.

2.10 Definitions:

- **The University / University**: Indicates The University of Iowa, Iowa City, Iowa.
- **Universities**: Indicates The University of Iowa, Iowa State University, and the University of Northern Iowa.
- **Binder / Vendor**: Indicates Binding Company or Companies.
- **Shall / Must**: Indicates mandatory requirement. Failure to meet these mandatory requirements may result in rejection of your proposal / bid as non-responsive.
- **Should**: Indicates something that is recommended, but not mandatory. If the Vendor fails to provide recommended information, The University may at its’ sole option, ask the Vendor to provide the information or evaluate the proposal without the information.
- **May**: Indicates something that is not mandatory but permissible / desirable.
At a minimum, any Vendor submitting a proposal must be able to meet the requirements that are outlined below. All Vendors must demonstrate their ability to comply with these requirements. Additional details relevant to the services and requirements outlined below may be provided through Attachment C: “Proposal Compliance Form”. Deviations from these requirements must be noted on Attachment C. Failure to comply may be reason for disqualification. All work is to be done for the Regent Libraries according to the specifications detailed in this Request for Proposal. These specifications apply to the binding and protective enclosure of monographs and serials and are to be adhered to by the Binder unless instructions from a Library directs otherwise and in that case, the change applied only to that Library. The specifications and administrative requirements outlined in this Request for Proposal are intended to serve only as a general guideline for each proposal. Each Vendor is expected to submit a detailed proposal that adequately describes the advantages and benefits, which the Regent Institutions would realize by acceptance of its proposal.

Binding Companies must clearly demonstrate and provide documentation substantiating that they are compliant in each of the following areas. The University reserves, solely, the right to reject any proposal if the evidence or references submitted by such Binding Company fails to satisfy the University that said Binding Company is properly qualified in any of these areas. It shall not be the responsibility of the University to request additional information to satisfy these requirements, if such information is not provided with the submitted proposal.

**General Services**

3.1 Binder must submit two samples of each work as identified in Section 3.21 including but not limited to: text blocks that have been double-fan adhesive bound; double-fan adhesive bound with clay-coated, glossy paper; fitted with a new case only (original sewing structure retained); over-sewn; sewn through the fold by machine and by hand; and a selection of portfolios and boxes typical of those made by the Binder. Additionally, the Binder must submit two samples of each type of end sheet used by the Bindery and two samples of any other product the Binder desires to propose and price in a contract bid, including prices for preservation services.

*Note: all samples requested must be clearly marked and labeled with Vendor name, name of sample and corresponding binding style for which each is appropriate. Samples submitted will not be returned to the Binders. One sample will be taken apart to determine quality of construction.*

3.2 Binders shall have adequate financial resources and be financially sound as demonstrated by the documents, requested in 4.1.5. The Binding Company must have been in business continually for the last five (5) years.

3.3 Binders must furnish at least three (3) large academic accounts, plus, one (1) small academic account, under $30,000, as references which can attest to the skill, competency, experience and adequacy of service of the Binder. Include with each reference, name of academic institution, name of contact person, address and phone number for service verification. See Section 7.4.

3.4 Binder must provide statistics regarding plant resources, as detailed in 4.1.6.

3.5 Binder must provide demonstration of a proven automated bindery preparation and records system,
meeting the specifications outlined in section 3.19. The system description must be accompanied by a sample of written operating instructions and/or manual, as well as demonstration of the capacity to convert existing on-line binding records. The Binder shall provide the names of three (3) references, with large academic accounts that have utilized the Binder's automated system including contact name, address and phone number. Binder must also provide as reference, the name, address and phone number of an academic account whose records were converted.

3.6 Binder must provide a single managerial level contact for each Regent institution to coordinate all Regent institutions' requirements and to be the point of contact for any problems/questions which may arise. This individual would meet periodically with Regent Library personnel, and be available by telephone, to review concerns, problems and/or questions relative to each Regent institution binding requirements. This individual must be able to successfully resolve, or to coordinate resolution of, any concerns or problems identified by the Libraries. Resolution must occur in a timely fashion. Additionally, the Binder must provide a full staff listing including management, customer service representatives, technicians and other bindery workers and the number of years of employment with the Binder.

3.7 If a satisfactory evaluation of the Binder cannot be made through review of the vendor’s responses and evaluation of the references provided, the Binder shall allow the Regent institution Libraries’ Binding Managers to visit the Bindery to inspect its operations if deemed necessary to evaluate the Binder. The cost of these visits, if necessary, shall be the responsibility of the Regent institutions.

3.8 Prior to the contract award, and at any time during the contract period, the Binder shall permit representatives from the Regent Libraries and/or Purchasing Departments (The University of Iowa, Iowa State University and The University of Northern Iowa) to inspect the Bindery during its normal working hours. Expenses related to these visits will be the responsibility of the Regent’s institutions.

3.9 Binder must be willing to provide a toll-free number for all communications from the Regent Libraries to the Binder.

3.10 All prices quoted shall be set in advance for all binding categories and for all standard piece-work. The Binder may perform special work outside the scope of the specifications, provided the Binder provides an estimate to the Library for this work prior to its being performed.

3.11 Prices quoted in this Request for Proposal are not subject to re-negotiation for the initial contractual period (36 months); two-24 month extensions are allowed (see section 6.12). Prices may be re-negotiated at the start of an extension period but they must remain firm for the 24 months of that extension. A notice of intent to change prices for an extension period must be submitted in writing to The University of Iowa Purchasing Department and to each Library no later than May 1st, prior to the fiscal year that they would take effect. In the event that any change in price cannot be mutually agreed upon, the contract is subject to cancellation by either party at the end of the contract period. Materials and services furnished to the Libraries are not subject to Federal Excise Tax, Federal Transportation Tax or Iowa State Sales Tax; such taxes should not be included in bid prices.

3.12 Each Library should have the ability to define an independent profile specifying default binding treatment for which no special processing costs would apply. For example, one Library may choose to bind all volumes flush while a second would elect that their volumes rest on the squares. If this independent profiling option is available, neither Library would incur an additional expense as the default treatment would be applied to all volumes bound for that Library. The Binder must provide a comprehensive list of any additional special processing costs, or up-charges (e.g., hand sewing, etc.), and must describe the conditions under which these fees shall be assessed.

3.13 The Regent Libraries reserve the right to specify binding styles and methods of treatment for any
and all items should this decision making be deemed necessary for any reason.

3.14 The Binder must insure, at no extra cost to the Library, all materials against loss or damage from any cause, from the time they leave the Library until they are returned. Each binding shipment is to be insured in the amount specified by the Library, but for not less than $100.00 per volume. The limit of liability for an item lost or destroyed shall be a sum that will cover the cost to the Library of reordering, processing and binding the item. As proof of compliance with this requirement, the Binder must furnish a Certificate of Insurance to The University of Iowa Purchasing Department with submittal of the proposal.

3.15 The Binder must be able to match the binding pattern, placement of lettering on the spine, and color of stamping foil and cloth to already-bound volumes of the Library’s periodical, serial and set titles.

3.16 Shipment Processing and Shipping Services

3.16.1 For packing, pickup and delivery, the Library will sort all materials by category (e.g., standard monographs, standard serials, etc.) and style of binding if specified (e.g., new case only, hand sew through the fold, etc.) and pack them for shipment to the Binder.

3.16.2 The Binder should make regularly scheduled pickups/deliveries or shipments. A frequency of every fourteen (14) or every twenty-one (21) calendar-days must be agreed upon by the Regent Libraries and the Binder, unless an individual Library and the Binder mutually agree to a different rate of frequency. The Binder shall specify in advance which day of the week the shipment shall be picked-up and returned.

3.16.3 There must be no separate charges for materials pick-up/delivery or shipment.

3.16.4 There must be no fuel surcharges.

3.16.5 Shipping cartons, pre-printed address labels and binding tickets must be provided by the Binder at no extra charge.

3.16.6 The Libraries shall have ownership identification on / in each piece prior to sending it to the Bindery.

3.16.7 Materials returned to the Library shall be packed in cartons with lot number, category of contents and specific destination legibly marked on the outside of the shipping cartons.

3.16.8 All materials should be bound and returned within the agreed upon turnaround time (see 3.16.2), except when one of the Libraries and Binder agree upon a different schedule for return of specific items or shipments.

3.16.9 All pick-ups and deliveries shall be made indoors at specific location(s) and during normal working hours as identified by each Library. The Libraries reserve the right to specify up to two pick-up locations for each Library.

3.16.10 The Binder is responsible for arranging commercial pick-up and delivery of incorrectly delivered items within a week of notification.

3.16.11 The Binder must be able to retrieve any individual item from any regular shipment at the Library’s request. The Library will endeavor to keep this type of retrieval to a minimum, and will pay
transportation costs for those items that must be returned to the Library by some means more expedient than the Binders trucking service.

3.16.12 The printing of binding tickets shall be done by the Library on forms supplied by the Binder. At least one copy of each binding ticket shall be included with each bound volume returned. Each binding ticket included in a bound volume must include at least the following data elements.

- Account number
- Title number
- Complete binding title
- Complete third panel information
- Complete fourth panel information, if appropriate
- Complete constant and variable call number information, if appropriate
- Memoranda (e.g., library-supplied binding instructions)

3.16.13 Blank binding tickets must be supplied, at no extra cost, for the preparation of manual work tickets.

3.16.14 The Libraries may, with permission of the Binder, create other types of binding tickets, for particular groups of materials, such as theses.

3.17 Billing Services

3.17.1 The Binder must provide detailed invoices electronically for each shipment. Invoices shall reflect the price structure delineated in this Request for Proposal. Each type of treatment must be listed separately, and include the number of items so treated, the charge per item, and the total charge for that treatment.

3.17.2 Each Library must be invoiced separately from all other Libraries even when one or more are located on the same campus (e.g., The University of Iowa Libraries and The University of Iowa Law Library). All invoicing must be sent to each Library’s billing address as designated in the contract.

3.17.3 The Binder must be able to bill separately those other departments for which the Libraries process binding, as well as keeping these accounts active for a period of five to seven years.

3.17.4 The Binder must accept electronic payment from each of the Libraries and departments.

3.18 Miscellaneous Services

3.18.1 At a Library’s direction, the Binder shall maintain a supply of security system detection strips. At a Library’s direction, these detection strips must be placed into all volumes for that Library during the binding process. The strips must not be damaged (bent, cut, etc.) before or during insertion, as this will destroy their charging ability. Only one strip shall be placed in a book.

3.18.2 Detection and removal of security strips from books sent for re-binding is the responsibility of the Binder.

3.18.3 Barcodes should be retained, unharmed, in their original positions whenever possible, unless otherwise specified by the Library.

3.18.4 Bindery tickets shall be inserted, without adhesion, into the volume following the title page.
3.19 Bindery Preparation and Records System Specifications (Online Services)

The Binder, at its own expense, shall provide a computer-based bindery preparation and record management system for the storage and manipulation of data controlling the titles that the Libraries will bind. The system shall provide for the electronic transmission to the Binder of binding shipment data (binding tickets). For purposes of this Request for Proposal, and resulting contract, the Regent Libraries shall not be testing sites for the Binder to determine its ability to provide automated record services. The Binder must supply reference contact names for three (3) active users of the on-line system with large academic accounts.

3.19.1 The Binder shall, at no additional cost, convert the existing online bindery records for serials and set titles maintained by each Library. Conversion of associated data files must be completed within thirty (30) days of the effective beginning date of the contract, and before the initial shipment pick-up is made. The conversion must result in the creation of a separate file, or database, for each Library. Binder must be able to demonstrate their ability to load the existing database of bindery preparation records mapping all data elements, including the slot positions for all spine lettering, into the Binders own file structure. Binder must supply a site reference where successful conversion occurred.

3.19.2 The source data comprising the “Binding File” and its associated “History File” shall remain the property, and responsibility of each Regent Library. The computer application program used to manipulate and utilize this data remains the property and responsibility of the Binder. The Binder will maintain, or contract with a third party to maintain, the binding management application program.

3.19.3 Upon written request the Binder must provide, at no charge to the Libraries, one complete digital copy of each Library’s database as well as the database and record layout specifications and any additional necessary programming instructions that would allow the Libraries to manipulate and use the data; database refers to the “Binding File” and the “History File” as noted below.

3.19.4 The system must identify each current periodical and continuation title with a binding record; these binding records will comprise the “Binding File”. Local entry must be optional for all fields. The system shall allow for the entry of the following elements in a binding record:

- Complete binding title including subtitles and series titles.
- Complete title number.
- Library’s local integrated system record number.
- Constant elements of the call number.
- Binding color or code.
- Foil color or code.
- Associated shipment number.
- Associated ticket number.
- Third panel information.
- Established pattern of fourth panel information (may be coded).
- Codes for elements used to complete the call number (four or more characters).
- Fourth panel of the last several previous uses.
- Variable parts of the call number (year, pages, etc.).
- Code for the location within the Library (at least four characters).
- Rush indicator.
- Memorandum field which will be printed on the binding work ticket with a minimum length of 78 characters.
- Designated area in which a Library may request specific additions such as Map Pockets, Stubbing, etc.
- Automatic imprint of the University’s abbreviation (e.g., UI, UI-LAW, ISU, UNI) at the spine tail, if the Library specifies.
3.19.5 The system must allow the Libraries to add new binding records. The system must allow the Libraries to modify, add and delete data within the binding and history records.

3.19.6 The system will allow shipment specific updates to be made to any binding record.

3.19.7 The system must provide an online data transmission mechanism such that volume specific binding information (binding tickets) can be electronically sent to the Binder for each shipment. The system may also include the ability for the Binder to transmit shipment data back to the Libraries. One copy of the printed binding ticket must be returned with each bound volume as described in 3.18.4 above.

3.19.8 The system shall provide the capability for preparing, and transmitting, monographic binding tickets.

3.19.9 Two forms of record deletion must be provided:
• A library operator may cancel or indicate that a particular binding work ticket is not descriptive of a volume to be bound. The record will not be deleted from the database, and;
• A library operator may, when it is no longer needed, cause the deletion or erasure from that Library’s database that data or record which is no longer specific to a particular shipment or shipments. This function must be security protected to prevent the accidental deletion of data.

3.19.10 The History File shall consist of the last three (3) years of binding activity for each title bound. It will be maintained on-line by the system and each record will include the following elements; local entry must be optional for all fields. The system shall permit the editing/correction of the binding history by library binding personnel.

• Complete binding title including subtitles and series titles.
• Variable subtitle or series title.
• Complete title number.
• Library’s local integrated system record number.
• Consistent elements of the call number.
• Binding color and code.
• Foil and color code
• Associated shipment number.
• Associated ticket number,
• Date (month / year) when ticket entered.
• Third panel information
• Fourth panel information for each volume bound during that period.

3.19.11 The system shall permit the printing of shipment lists, which will include all binding record information. Available sort for this list must include: by ticket number, by call number, by alphabetical title order, or by library local bib system/record number. The system shall provide a means of determining the number of items prepared for a current shipment grouped by the binding treatment specified. This transaction counting function shall distinguish all deleted transactions tickets when indicating the number of transactions in a shipment.

3.19.12 The system shall have the capacity of supporting, providing access to, and maintaining through updates each Library’s Binding File. The current approximate size of the Libraries Binding Files:
3.19.13 The system shall allow the copying of data from one binding record to a new record. This feature must allow the transfer of shipment specific up-dates to the new record. The system shall provide programmable function keys.

3.19.14 The system shall provide for the utilization of more than one binding color in conjunction with a particular title or title-call number combination.

3.19.15 System response time must meet the Libraries’ need for rapid processing of a high volume of material. Record retrieval, record creation and editing must be possible with no system imposed response delays. Data transmission rates must meet or exceed industry averages. Simultaneous use of system must be permitted and not interfere with response time.

3.19.16 A full range of search options shall be provided for binding record retrieval including, but not limited to: title, call number, title number and various standard numbers, including locally defined numbers.

3.19.17 The system shall permit the printing of any work screen and all of its elements at any time.

3.19.18 The Binder must provide, at no extra charge, sufficient printed copies of each Library’s binding file in alphabetical order by title or title number or by call number. This print copy of the binding file shall be produced at a minimum, annually. Alternatively, the system shall provide an easy mechanism for printing such a list locally on demand. The system shall also provide a means for easily determining the total number of records in the database.

3.19.19 The Binder shall furnish diagnostic services over-the-phone to the Libraries for remedial maintenance during normal business hours. In the event that the defect or malfunction cannot be corrected by telephone communications, the Binder must provide timely on-site support to restore the system to normal operation.

3.19.20 The Binder is responsible for the initial on-site training of the Libraries’ staff in the use of the system and for any training related to subsequent improvements. Additionally, The Binder will provide for repetition of the initial training, on-site, if sufficient Library staff turnover makes such training necessary.

3.19.21 The Binder must provide written documentation for the system and must up-date this documentation as the system is modified. The Binder must provide copies of the documentation and its up-dates to each Library identified in this Request for Proposal and resultant contract in sufficient number as determined by each Library and at no cost to the Library.

3.19.22 The system shall provide for simple and effective back-up of all parts of the operating system and databases. It shall have sufficient safeguards to prevent the accidental deletion of shipment specific data. The system shall have security options sufficient to prevent use by unauthorized individuals.

3.20 Technical Specifications

Unless otherwise specified, all work must conform to the current ANSI/NISO/LBI Z39.78 Standard for Library Binding referred to here as the NISO/LBI Standard. All citations in the Request for Proposal...
refer to the 2000 edition. Any subsequent modifications to or revision of the NISO/LBI Standard shall automatically become part of this Request for Proposal and resultant contract upon adoption by the Library Binding Institute. *Numbers in parentheses in the following text refer to the relevant sections of the NISO/LBI Standard.* Comments provide special emphasis or special requests of the Regents Libraries. These comments may qualify or extend application of the relevant NISO/LBI Standard.

### 3.20.1 Assessment (examination, collation, preparation & repair)

The Binder shall examine all volumes to detect damaged leaves and peculiarities of paper or construction that might make first-time binding or rebinding inadvisable. The Binder shall use the leaf attachment method following each individual Library’s profile (see Append. III). The library will make reasonable efforts to flag illustration spreads, maps, and inserts in order to alert staff to matter that would otherwise be damaged by trimming and/or sewing, but this assistance does not relieve the Binder from the obligation to be alert for such material. Based on this inspection a suitable method of leaf attachment shall be selected.

On selected titles, each Library may state a specific leaf attachment method. When specified on the binding slip, the Binder shall follow those instructions; however, if the Binder determines that the specified leaf attachment method would be inappropriate, the Library shall be contacted by phone or email in order to approve alternative method.

For individual Libraries that choose to use institution specific designed end sheets, the Binder shall utilize such end sheets for all forms of binding and rebinding.

All paper tears shall be repaired with heat-set tissue or transparent pressure-sensitive alkaline paper mending tape unless there are special arrangements to decline mending or to use alternative mending materials.

The Binder shall hinge (with strips of alkaline paper or cloth of an appropriate weight) all double leaves, maps, inserts and stiff paper covers in order to preserve printed matter which would otherwise be destroyed by trimming, sewing, and/or double fan adhesive binding along the spine edge or inaccessible to use. All hinges shall be at least ¾ inch in width to insure that hinged material will extend far enough from the gutter of the binding to allow easy access to the information.

*If the Binder determines that certain library volumes sent for binding are not able to be bound or may be damaged by binding, the books shall be returned to the Libraries with notice of such determination.*

### 3.20.2 Standard monograph (5.1 and 6.1)

A monograph is defined as one piece of graphic material submitted for binding or rebinding as a single unit without reference to another. Libraries assume responsibility for any multiple item uniformity of color and cover stamping. Incomplete or defective volume shall be returned unbound unless the Library has acknowledged the incompleteness or defect.

### 3.20.3 Standard Serial (5.2 and 6.3)
A serial or continuation is defined as a series of two or more serially numbered graphic units to be bound together, for which cloth color must be selected and cover stamped by the Binder so as to match other publications in the same set or series.

Serials shall be collated by the Binder to assure their completeness and to absolutely confirm correct sequence of parts. Incomplete volumes shall be returned unbound unless the Library has acknowledged the incompleteness. Covers, advertisements and similar material shall be retained in place, unless otherwise specified by the Library on a per title basis.

When serial parts combine both folded and adhesive bound issues, the folded items shall be stitched and integrated with adhesive bound material.

3.20.4 Theses

The preferred method of leaf attachment will be double-fan adhesive binding. Theses may be oversewn when judged necessary by the Binder. Theses may be sent to the Binder as loose printed sheets, or sent as PDFs via email or on a computer storage device. The copies will be produced on paper stock that meets ANSI/NISO Standard Z39.48-1992 Permanence of Paper for Printed Library materials. See section 3.23.1 for additional requirements for printing.

The Binder will also provide an online form for students of the Regent Universities to use to submit their theses directly to the Binder for personal binding. The Binder shall extend the same contractual pricing to our students.

3.20.5 Music

Music shall be bound to open flat. Multi-signature items with folded signatures and broken sewing shall be dis-bound and then sewn through the fold by the Binder. Tyvek or cloth pockets should be provided to contain music parts. Each music part consisting of more than a single folio shall be gathered, reinforced with outer end sheets and sewn through the fold.

3.20.6 Pamphlets

Applied to single-signature items, such pamphlets should be sewn through the fold into a pamphlet binder constructed with a clear polyester front cover.

3.20.7 Attaching Leaves (7.0)

3.20.7.a New Case (7.1)

When text blocks are sewn through the fold, oversewn, or side-sewn, and are intact (that is when the original sewing thread is unbroken and the number of stitches is adequate for the size and weight of the text block) the sewing shall be retained and the text block fitted with a new case.

3.20.7.a.1 Preparation (7.1.1)

Old covers, adhesive and back lining shall be carefully and completely removed from the text block without damaging the sewing thread. The text block shall be inspected after the back is cleaned. If the
original sewing is not sound, minor repairs shall be made, a different method of leaf attachment shall be selected, or the volume shall be returned to the Library.

3.20.7.a.2 Attaching endpapers (7.1.2)
Sewn endpapers shall be applied. These can be sewn on with continuing stitches begun in outer gatherings of the text, or by sewing to linen tapes adhered to the text back or by tipping of endpapers to the text followed by stitching through the back lining fabric.

3.20.7.a.3 Endpaper construction (7.1.2.1)
A single leaf hinged with reinforcing material to a single folded sheet, or a folded sheet hinged with reinforcing material to another folded sheet with sewing piercing the inner (text adjacent) folded sheet shall be used.

3.20.7.b Sewing through the fold (7.2)
Sewing through the fold may be provided by hand stitching or by machine stitching.

3.20.7.b.1 Preparation (7.2.1)
Staples shall be removed prior to sewing. Weakened and damaged folds shall be reinforced or repaired with pressure-sensitive alkaline paper mending tape.

3.20.7.b.2 Attaching endpapers (7.2.2)
Sewn endpapers shall be applied. Hand sewn text and endpapers shall incorporate linen tapes.

3.20.7.b.3 Endpaper construction (7.2.2.1 and 7.2.2.2)
For multiple signature texts, a single leaf hinged with reinforcing material to a single folded sheet, or a folded sheet hinged with reinforcing material to another folded sheet with sewing piercing the inner (text adjacent) folded sheet shall be used. For single signature texts, two folded sheets with the outer folded sheet reinforced. The signature and the endpaper shall be sewn together as a single unit shall be used.

3.20.7.c Double-fan adhesive binding (7.3)

3.20.7.c.1 Preparation (7.3.1)
Trimming will not be used to remove staples from a side-stapled volume. Such staples must be removed by hand.

No adhesive binding will be re-cased without new double-fan leaf attachment performed by the Binder. All original adhesives will be removed from book spines by milling to allow for new double fanning.

3.20.7.c.2 Attaching endpapers (7.3.2)
Endpapers should be attached during the double-fan operation.

3.20.7.c.3 Endpaper construction (7.3.2.1)
Endpapers shall be constructed of a single folded sheet.

3.20.7.d Oversewing (7.4)
On request, this method shall be used for monographs and serials printed on sturdy, flexible papers with an unprinted margin of at least 5/8th inch (after milling).

3.20.7.d.1 Preparation (7.4.1 and 7.4.3)
No more than 1/8th inch of binding margin shall be removed by milling.

3.20.7.d.2 Attaching endpapers (7.4.1)
Endpapers shall be sewn continuously with the text sewing.

3.20.7.e Cleat lacing
This method of leaf attachment may be used when (and only when) none of the other leaf attachments outlined above or in the NISO/LBI Standard are practical.

3.20.8 Trimming the text block (8.0)
The Libraries, unless otherwise noted in Appendix III, request a “no trim” general specification. Requests for trimming of the head edge only will be accepted as well as request for trimming of all edges. Trimming should be as slight as possible with a maximum allowance of 1/8 inch.

3.20.9 Spine treatment (10.0)

3.20.9.b Rounding and backing (10.1)
Rounding and backing shall be provided on volumes ½ inch or thicker.

3.20.9.a Flat backed (10.2)
Rounding and backing shall be omitted on volumes thinner than ½ inch.

3.20.10 Lining the back (11.0)
The lining shall extend to within ½ inch of the head and tail of the text block, and extend squarely onto each endpaper at least 1 inch. Binder will provide uniform, secure adhesion of the lining, without voids, to the back of the text block. Text blocks over 1 inch thickness shall have an alkaline paper lining applied over the cloth lining.

3.20.11 Cover making (12.00-21.06)
Cover board shall be provided in various thicknesses, which will be applied in accord with volume size and weight. For exceptionally large volumes the boards shall be no less than 0.125, for heavy or large, no less than 0.095 and for small or light volumes, no more than 0.08.

The inlay shall be cut squarely and shall be the same width as the back of the text and height of the cover boards. Covering material shall be cut squarely, providing 3/4 inch overhang on all four sides to provide 5/8 inch turn-ins. Lay out space for a grooved joint shall not exceed 1/3 inch (8mm). The cover shall be assembled with secure bonds throughout. Corners will be uncut to produce a library corner.

3.20.12 Casing in (13.0)
Squares should be uniform over each edge except for volumes specified for a flush tail casing.

Cased-in volumes shall either be pressed between edged boards until thoroughly dry; or built-in by machine using sufficient heat, dwell and pressure to ensure tight adhesion of the endpapers to the
boards and the covering material to the joint of the text block. The back lining margin extending onto
the pastedown will be securely bonded to the gutter margin of the cover boards.

3.20.13 Lettering (12.2)
All lettering shall be in 18 point, except for volumes thinner than 1 inch, which shall be lettered in 14
point. All call numbers shall be stamped in 18 point. Characters must be available in upper and lower
case as well as in standard diacritical characters.

Author and title information shall be placed in horizontal lines across the spine of the cover, unless
the volume is thinner than 5/8 inch. When a volume is thinner than 5/8 inch, the author/title
information should be in vertical lines running down the spine. For items with a spine width of less
than 1 inch, the Binder may truncate the title, if no spine title has been supplied by the Library.

The order of priority for placement of call numbers on the covers of classified volumes is: (1) in
horizontal lines on the spine and, when volumes are too thin, (2) in vertical lines on the spine. If
the volume is too thin for the text to be on the spine it should be printed in horizontal lines on the
lower left-hand corner of the front cover near the spine, unless the individual library adopts another
placement in its standard binding profile.

Binder must be able to letter stamp an ownership initial (e.g., ISU, UNI) on a line at the spine tail
(within the bottom ½ inch of the spine). Each Library shall have the option of this as part of their
binding profile.

Book lettering shall be done in white and enclosure lettering shall be in black as a standard unless the
Libraries stipulate another color foil for selected items or legibility is limited.

3.21 Materials Specifications
Unless otherwise specified, all materials must conform to the current ANSI/NISO/LBI Z39.78
Standard for Library Binding and referred to here as the NISO/LBI Standard. Comments provide
special emphasis or special requests of the Regents Libraries. These comments may qualify or extend
application of the relevant NISO/LBI Standard.

3.21.1 Paper (15)

3.21.1.a Inlays (15.3)
Inlays shall be alkaline and buffered.

3.21.2 Reinforcing material (17.0)

3.21.2.a For lining backs of text blocks (17.2)
Back-lining materials will be selected based on strength and flexibility and the support they provide to
the text block and cover; working properties of the material as it relates to automated machinery in the
bindery is a secondary consideration.

3.21.3 Adhesives (19.0)

3.21.3.a Adhesive for double fan binding (19.2)
Adhesives used in the double-fanning process shall be selected with the greatest emphasis given to strength and flexibility properties of the adhesive rather than on how well the adhesive works in automated double-fan binding equipment. A high-solids, emulsion copolymer of internally plasticized polyvinyl acetate adhesive designed for cold emulsion binding of book leaves shall be used. If the Binder chooses to use an alternative adhesive, the Libraries must be informed of this decision and approve its application.

3.22 Enclosures

3.22.1 Portfolio
Shall provide excess dimension not greater than 1/8 inch top to bottom, or side to side. A portfolio shall have three or four flaps. Excepting with single sheet or items ¼ inch or less, the flaps should be double creased to accommodate the item thickness. The lining shall be of alkaline paper or smooth surfaced permanent/durable board. Boards shall be of a weight suitable for the size and weight of the contents they are meant to protect. The spine width of the cover should permit a square and snug closing over the portfolio flaps. With approval of the individual Library, their standard profile will permit group C/C-1 grade cloth on small portfolios (items less than 8 inch height), otherwise Buckram grade is specified.

3.22.2 Bindery built book box (cloth covered clam-shell or double-tray)
Shall provide a free fit for the enclosed item with excess dimension not greater than 1/8 inch top to bottom, or side to side. The design shall be a drop spine configuration with a snug fit and square alignment of the telescoping trays on closing. With approval of the individual Library, their standard profile will permit group C/C-1 grade cloth on small boxes (items less than 8” height), otherwise F grade Buckram is specified.

3.22.3 Machine cut corrugated board clam-shell box
Library shall: (1) supply the Binder with three (3) dimensional measurements for each box, or (2) send a book to the binder for this enclosure service. All boxes will be made to these dimensions with no more than 1/8 inch tolerance. Library shall provide title and call number information to the Binder. All boxes will include title and call number stamping on the spine in black or white depending on which is most legible.

3.22.4 Phase box
Phase boxes shall be constructed of buffered board that will crease without splitting. Configuration shall be two pieces of board crossed and adhered to form a floor and four flaps that wrap around the item. The flap to be folded over the item first shall be stamped “Fold this flap first”. Rivets for ties should be placed on the fore-edge flap so that the box does not snag adjoining items.

3.23 Other Preservation Services

3.23.1 Preservation Facsimiles
This service shall provide duplexed facsimiles from cut pages of brittle books or from bound volumes if the Library chooses. The copies will be produced on paper stock that meets ANSI/NISO Z39.48.1992. This paper may be supplied or specified by the Library. Printer/copier engines must be maintained to assure fusing of the image.
The service shall provide effective reproduction of both text, halftone, and continuous tone originals with capacity for, black and white, gray-scale, full color and oversize reproduction of graphic originals. The facsimile will be produced at 100% of the original text/image with the book margins of the text block of the facsimile increased by 1/8 inch, and the gutter margin will be at least 1 and 1/2 inch from text to gutter edge.

Before binding, the service shall provide accurate collation of the facsimile, page by page, along side of the original. Pages will also be checked for overall image quality including skew, alignment, and ink density. The original shall be returned in proper order and carefully reassembled.

### 3.23.2 Preservation Imaging

This service shall provide digital capture of book pages, documents, photographs, maps and other flat paper items, and microfilm/microfiche to be delivered in standard imaging formats recorded to computer storage device or transmitted to the library as requested. File management and metadata production routines to be mutually established by Library and Binder.

#### 3.23.2.a Handling

3.23.2.a.1 All digitization and image processing must be done at a vendor’s location and on vendor’s servers. Materials or captured images should not be shipped either physically or electronically outside of the United States.

3.23.2.a.2 No Automatic Document Feeders (ADFs) are allowed for digitizing materials.

3.23.2.a.3 For bound documents with physical page sizes up to 11” X 14”, a book cradle without glass must be utilized to minimize stress on bindings and spines. At no times should the book be opened beyond 110 degrees. For larger format books, glass with minimal pressure may be utilized to capture the image.

#### 3.23.2.b Bit depth

3.23.2.b.1 Bitonal Images—any page image which consists of text only or which consists of line art against the background paper color should be captured as a bitonal image.

3.23.2.b.2 Grayscale Images—any page image which uses color halftone or continuous tone photographs, variously shaded gray graphs or diagrams, or variously shaded gray lines to distinguish among multiple chart or illustrative elements should be captured as a grayscale image. All grayscale images should be captured in an 8-bit color space.

3.23.2.b.3 Color Images—any page image which uses color photographs, colored bar graphs or diagrams, or colored lines to distinguish among multiple chart or illustrative elements should be captured as a color image. All color images should be captured in a 24-bit color space, preferably the RGB color space.

3.23.2.b.4 Grayscale and Color Images, Other—segmentation (background removal) will be available for materials that have color and/or grayscale pictures intermixed with bitonal text. Vendor will be...
able to retain square color and/or grayscale pictures (segment image) while dropping out the background for the text, resulting in crisp text and pictures, combined with a white background.

3.23.2.d Image Resolution Requirements
All image resolution requirements are based on optical resolution not interpolated.

3.23.2.d.1 Standard Format text—all captured images must have a minimum resolution of 300ppi for standard format items, including flat, bound and disbound materials.

3.23.2.e Deliverables
Both uncompressed TIFF images as well as high quality PDF compression that help make image files that include color and grayscale and viewable (i.e. via the Web) should be made available to the Library on a computer storage device chosen by the Library. For the PDF, levels of compression should be adjustable and the resulting PDF should be fully text searchable via OCR.

3.23.3 Conservation Services
Conservation services render single-item treatments on library and archival materials deemed by the steward institution as rare or special. Conservation treatment should retain as much of the item’s original material as possible, as well as protecting evidence of provenance. The goal of conservation treatment will be specified as stabilization or restoration on a case-by-case basis. Conservation treatment should use pH-appropriate, conservationally-sound materials, maintaining reversibility of treatment wherever possible.

3.23.3.a Binder’s conservation services division should be available to discuss standard treatment options with the conservator, librarian, or curator responsible for having the item treated.

3.23.3.b Once the item has been shipped to the Binder’s conservation services division, a written treatment proposal along with itemized cost estimates for time and materials shall be provided for approval by the steward institution before any treatment work begins.

3.23.3.c Once the treatment proposal has been approved by the steward institution, the treatment should be performed and documented according to the American Institute for Conservation of Historic and Artistic Works (AIC) Guide to Digital Photography and Conservation Documentation and AIC Code of Ethics and Guidelines for Practice.

3.23.3.d The Binder must notify the conservator, librarian, or curator who approved the treatment proposal when significant changes to the treatment proposal are found to be needed during the course of treatment. The Binder must also provide prompt notification if the treatment cost or timeline changes by 30% or more.

3.23.3.e A written treatment report with Before and After Treatment photographic documentation (on CD) and a specific list of materials/supplies used for treatment should be provided when the item is returned to the steward institution.

3.23.3.f The conservator, librarian, or curator responsible for having the item treated will provide an estimate of the item’s value for insurance purposes, in case of loss or damage. If no value is provided, the assumed value is $100.
3.24 Compliance to Technical/Materials Specifications

3.24.1 Changes, improvements
Changes from NISO/LBI Standard technical services and materials may be acceptable to the Libraries provided that evaluation of such changes (i.e., change of adhesive type used for double-fan binding) shall be independently tested to verify protection and increased longevity of the item. Such testing will be commissioned by the Binder. Testing data for the changed technique or material will be provided to the Libraries and submitted to the Library Binding Institute for review and approval.

3.25 Errors and Delays

3.25.1 Any errors made by the Binder shall be corrected (provided corrections do not damage the text block) without additional charge to the Library and returned with the next shipment. Any extra transportation costs resulting from such errors shall be paid for by the Binder. Errors that require the skills of a conservator to correct, or, which cannot be corrected, shall be subject to “Insurance and Security” provisions as detailed in this Request for Proposal.

3.25.2 The Binder shall pay a liquidated damages charge of one dollar per calendar week, or any part thereof, for each overdue item. No penalty shall apply in cases in which the Library has been notified that the return of an item will be delayed due to the need for special treatment.

3.25.3 Whenever books are withheld from a return shipment for any reason, the return consignment documentation must explain what books are withheld and the reason for such action.

3.25.4 If a volume is damaged during the Binding process, the Binder shall be held responsible for the cost of replacement as well as a processing fee to be determined by each Library.

3.26 Guarantee
The Binder shall guarantee binding work for the life of the paper and shall repair failures, at no cost to the Libraries, all bindings which have failed when the failure is not the result of mistreatment, poor handling or brittle paper.

3.27 Performance Bond
Upon receipt of Notice of Award or Purchase Order, the vendor may be required to furnish a surety bond in the amount of one hundred percent (100%) of the contract price as security for faithful performance of the contract. The bond shall be in the form of the "Contract Performance Payment Bond Form" (Addendum C). The surety on such bond shall be a surety company duly authorized to do business in the State of Iowa, and said bond shall be signed or countersigned by an Iowa resident agent. Attorneys-in-fact who sign surety bonds must file with each bond a certified and effectively dated copy of their power of attorney. The Performance Bond shall be furnished within thirty (30) days after the date of the award.
SECTION 4   SCOPE OF WORK / VENDOR QUESTIONS

Your proposal must contain information relative to each of the items listed below in this Section 4 to be considered responsive. Please respond in the order given. Answers should be detailed and complete. It is the responsibility of the Binding Company to clearly mark and identify any and all trade secret, proprietary or confidential information. (See Terms and Conditions, Section 6.16 and Section 7.3). Be certain that your proposal is signed by an officer or authorized agent of your company.

4.1 General Business Information

4.1.1 Provide a brief description of your Company including the name(s) of its owner(s) and/or principal officer(s), the date of origin and/or incorporation and the length of time your company has been in the Binding business.

4.1.2 Provide resumes or biographical sketches of the representatives and managers you propose to assign to the Regents Library Binding contract. Describe experience levels of each individual. Additional education, schools and training sessions that have been completed should also be noted.

4.1.2.a Provide a full staff listing including management, customer service representatives, technicians, and other bindery workers and the number of years of employment with the Binder.

4.1.2.b Are any of your employees affiliated with a union? If there is a union presence in your plant, please identify the union and discuss your procedures for notifying the Libraries of any strike related disruption in binding work and shipping schedules.

4.1.3 Per Section 3.3, provide at least three (3) large academic accounts, plus, one (1) small academic account under $35,000, as references that can attest to the skill, competency, experience and adequacy of service of the Binder, include with each reference, name of academic institution, name of contact person, address and phone number for service verification. This information should be entered in Section 7.4.

4.1.4 If your Company is currently for sale or involved in any transaction to expand or to become acquired by another organization, please explain. If your Company has been involved in any reorganization, acquisition, or merger within the last three (3) years, please explain.

4.1.5 Binders shall have adequate financial resources and be financially sound as demonstrated by the furnished balance sheet / financial statements, showing that the Binding Company has been in business continually for the last five (5) years. The most recent annual report should also be included.

4.1.6 The Binder shall demonstrate sufficient capacity to handle the Libraries binding volume by submitting statistics regarding plant resources including, but not limited to:

- Square feet of plant space
- Full-time regular employees
- Machines for through-fold sewing (state name of manufacturer)
- Oversewing machines (state name of manufacturer)
- Adhesive binding machines (state name of manufacturer)
- Spine-milling machines (state name of manufacturer)
4.1.7 To what professional and/or service organizations does your Company belong?

4.1.8 Are you working with any development partners or other third party vendors to provide any of the services outlined in this RFP?

4.1.9 Do you have a means of centrally billing each of the Regent institutions for bindery services accomplished?

4.1.10 Describe, in detail, programs which are made available to your representatives for continuing education opportunities, (i.e., automation enhancements, product knowledge, etc.). How frequently and by what means do you monitor your representatives’ performance? Describe the type of training you provide for representatives responsible for the Regent institutions’ account.

4.1.11 Binder must submit two samples of each work as identified in Section 7.8 Requirements Checklist. Additionally, the Binder must submit two samples of each type of end sheet used by the Bindery and two samples of any other product the Binder desires to propose and price in a contract bid.

   Note: all samples requested must be clearly marked and labeled with Vendor name, name of sample and corresponding binding style for which each is appropriate. Samples submitted will not be returned to the Binders. One sample will be taken apart to determine quality of construction.

4.1.12 The Binder is requested to specify their usual source(s) by business name; (e.g., Library Binding Service, Des Moines, IA; Holliston, Kingsport, TN; Gane Brothers, Elk Grove Village, IL) of materials and products used by the company for the binding or treatment of library materials (e.g., binders board, cover cloth, adhesives, thread, lining materials, etc.).

4.1.13 Provide a list of all adhesives used and their usage, including those used in conservation.

4.1.14 Binder is asked to explain what experience they have had with any of the mass deacidification methods, what system(s) they use or plan to use, what services they offer, or plan to offer, and their pricing and processing procedures.

4.1.15 Binder is asked to explain what experience they have had with digitizing microfilm, what services they offer, or plan to offer, and their pricing and processing procedures.

4.1.16 Describe any additional unique business features, pricing arrangements, special services, terms and conditions, or other value-added services your Company would provide under any agreement resulting from this Request for Proposal. Indicate additional charges, if any, for these services on Attachment D.

4.1.17 Describe in detail how your Company will minimize and contain binding costs while maintaining the highest level of service for the Regent institutions.

4.1.18 What are your company’s plans regarding future developments and/or enhancements to the online bindery preparation system that you will be proposing to the Libraries? Are there plans for developing, or participating in the development of, an interface between an integrated library system and the Binder’s system? Does such an interface currently exist with any of your customer’s systems? Are any of your customers passing data from your bindery preparation system through any standard
application programming interfaces (APIs)? Explain in detail.

4.2 Communication

4.2.1 In addition to the provision of a toll-free number or to an agreement to accept collect calls from the Libraries, describe what other methods of communication your company can make available to the Regent Libraries. What, if any, costs are associated with this. Explain in detail.

4.2.2 Explain what schedule will be used to determine when a representative from the Binder will visit each of the Regent Libraries. Will this representative be available upon request? Explain in detail.

4.2.3 What will your company do to ensure that the Libraries Binder-representative(s) are thoroughly familiar with the terms of this contract, have in-depth knowledge of the technical aspects of library binding and the operations of the Binder she/he represents as well as an understanding of the relationships between library binding and the preservation of library materials? Explain in detail.

4.2.4 Describe how your Company will periodically, quarterly at a minimum, measure and report customer satisfaction. Describe how your Company would work with Regent institutions and contract administrators to assess a customer management/satisfaction report and determine needed process improvements. Explain in detail.

4.2.5 How do you propose to devote a sufficient number of representatives to our account to adequately handle our needs? How many representatives will be dedicated to service the Regent institution binding needs? How will you determine this? How and when would you change the number of representatives?

4.2.6 What training will be available when there are any major personnel changes? What type of training processes will your company propose when new bindery services are introduced, made available, etc? Explain in detail.

4.3 Accounting and Management Reports

4.3.1 At a minimum, the selected Binding Company may provide various standard monthly and quarterly reports, which contain summary data relative to binding work conducted at each Regent institution including transaction counts and fiscal information. List any other types of reports you are willing and able to provide. The Libraries may require customized reports as well. Please specifically state whether your Company can generate these types of reports and include samples of same. Describe the accounting system, which will be used to provide management reports. Please provide examples of financial management reports currently being generated by your Company.

4.3.2 Describe any innovative alternative billing methods, which would assist the Regent institutions in directly transferring binding charges to appropriate University accounts. Provide examples, names and phone numbers, of companies for which this type of billing was accomplished.

4.3.3 The Regents Institutions are interested in the possibility of doing business with vendors electronically. The University of Iowa currently has the ability to deposit payments for invoices directly into a vendor’s bank account. The University of Northern Iowa can accept electronic invoicing via the Innovative Interface system if the vendor provides EDI. More electronic invoice and payment capability may be available in the future. The capacity to deliver purchase orders and process invoices electronically may be in the future as well.

Please indicate your ability to accept or send the following electronically:

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
</tr>
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<tbody>
<tr>
<td>Payments</td>
<td></td>
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State Method (i.e. EDI or ACH): ____________ ____________

Invoices  _____ Yes ______  _____ No ______  
State Method (i.e. EDI or XML): ____________ ____________

Purchase Orders  _____ Yes ______  _____ No ______  
State Method (i.e. EDI or XML): ____________ ____________

Please indicate the percentage discount you would offer a Regents University for processing your payments electronically:

1.0% ____  
1.5% ____  
2.0% ____  
2.5% ____  
3.0% ____  
Other ____

If you are currently unable to conduct business electronically, are there any other prompt pay cash discounts your company would be willing to offer? Explain in detail.

4.3.4 What national standards does your company intend to support in conducting electronic commerce and why? Explain in detail.

4.3.5 Provide examples of the standard invoices that will be sent to the Libraries. Is it possible to adjust the format and content of the invoice forms?

4.4 Shipment Processing and Shipping Services

4.4.1 What measures will your company take to assure the proper, prompt transport and handling of library binding materials? Explain in detail.

4.4.2 What schedule would your company propose for sending and receiving binding shipments? What turnaround time would be offered to the Libraries? If there is a difference in pricing depending on the schedule, please provide separate pricing for each frequency proposed.

4.4.3 What type of delivery system(s) will your company use to facilitate the delivery of items to and from the Regent Institutions? Explain in detail.

4.4.4 What, if any, additional costs would be associated with shipment “special handling” of items for the Regent Institutions (e.g., rushes, retrievals)? Explain in detail.

4.4.5 Each volume bound under this contract shall be given a label or stamp indicating the name of the bindery. The label shall specify the month and year in which the volume was bound. The label shall be affixed to the inside back cover, lower right corner. Explain how you will comply with this requirement.

4.4.6 Can your company provide an imprint of the Library’s initials on the tail (bottom) of the spine below the call number? What is the cost for this feature? If not, explain how this might be achieved and the extent of cost involved with this process.

4.4.7 What security measures can your company provide in relation to the electronic transfer of data (e.g., FTP)? Can you provide encrypted user IDs and passwords?
4.5 **Contract Implementation**

4.5.1 Please estimate the start-up time required from proposal acceptance to contract implementation, including conversion of existing library records. Can your Company begin servicing the Regent institution’s binding needs on October 1, 2011 if your proposal is accepted by August 15, 2011?

4.5.2 Describe the methodology and time-table your company would propose to implement an online binding system for bindery preparation and binding record keeping. Explain in detail.

4.5.3 Wherever the Company is unable to provide bindery services that meet or exceed those listed in Section 3, Specifications / Vendor Requirements, provide detailed information describing how the Company plans to accommodate the Regents binding service needs. Lack of response to this subsection is a statement that your Company is able to meet or exceed the levels of all services listed therein.
SECTION 5 EVALUATION CRITERIA / METHOD OF AWARD

5.1 In general, evaluation of proposals will be based on, but not limited to, the following criteria, which are listed in no particular order of importance:

- Compliance with proposal requirements
- Scope of services offered
- Samples evaluation
- Quality of product
- Automated support and tracking systems
- Ability to handle high volume clients
- Packing, pickup and delivery services
- Speed of shipment turn-around, Library to Binder to Library
- Management reporting capabilities
- Responses to Sections 4 and 7
- Financial responsibility/stability of the Binding Company
- References of the Binder
- Qualifications of the employees assigned to the Regent institution’s account
- Supplemental services or arrangements which add value to the agreement
- Benefits and/or financial incentives offered
- Pricing schedule / structure
- Programs designed to measure and report customer satisfaction

5.2 Proposals will be evaluated on a weighted point evaluation method by a committee designated by the Regent’s institutions. The financial terms will not be the sole determining factor.

5.3 A vendor’s submission of a proposal constitutes their acceptance of this evaluation technique and their recognition and acceptance that subjective judgments will be used by the evaluators in the assignment of points.
SECTION 6 TERMS AND CONDITIONS

Unless a Vendor expressly and specifically states otherwise in its proposal, submission of a proposal indicates the vendor’s acknowledgement and acceptance of the following terms and conditions:

6.1 University Rights/Obligations

6.1.1 The University of Iowa, acting as lead agency, reserves the right to accept or reject any or all proposals, waive irregularities, to accept any part of a proposal, to withhold the award, or to make no award as is deemed to be in the best interests of the Regents Universities.

6.1.2 The University will not pay for any information requested herein, nor is it liable for any costs incurred by the Vendor in responding to this request. All proposals submitted become the property of The University and will not be returned to the Vendor.

6.1.3 No responsibility will be attached to any person or the University for premature opening of a proposal not properly identified.

6.2 Vendor / Proposal Obligations

6.2.1 The successful Vendor must be licensed to do business in the State of Iowa and comply with provisions of Chapter 490 of the Iowa Code.

6.2.2 The proposal constitutes an offer by the Vendor which shall remain open and irrevocable for a period of one hundred twenty (120) calendar days from the proposal due date.

6.2.3 The Vendor consents to the University contacting and obtaining any information relevant to this Request for Proposal from the references identified by the Vendor in its proposal or other sources deemed appropriate by the University.

6.2.4 Failure to supply information requested may be cause for rejection of the proposal as non-compliant.

6.2.5 If a proposal is sent by mail, the Vendor should make allowance for the time required for such transmission. The University employee whose duty it is to receive proposals will decide when the specified time has arrived and no proposal received thereafter will be accepted.

6.2.6 Determination of compliance and responsiveness to the requirements of the RFP will be made after a thorough and careful review of the proposals. Public review of the submitted proposals will not be possible until an award has been made and the University has removed any trade secret, confidential or proprietary information, if any, from the proposals.

6.2.7 The contents of the proposal and any clarification thereto submitted by the successful Vendor shall become a part of the contractual obligation incorporated by reference into the ensuing agreement, unless modified by mutual agreement, in writing.

6.2.8 Any and all interpretations, corrections, revisions and amendments shall be issued by the University’s Purchasing Department to all holders of proposal documents in the form of addenda.

6.2.9 Modification or Withdrawal of a Proposal: Submitted proposals may be withdrawn only by written notice to the University of Iowa Purchasing Department. Such notice must be received by the
University Purchasing Department **prior to the designated date and time for the receipt of proposals.**

6.2.10 Withdrawn proposals may be re-submitted up to the time and date designated for the receipt of proposals provided that they are fully in conformance with the proposal instructions and conditions.

6.3. **Formation of the Agreement**
At its option, the University may take either of the following actions to form an agreement between the Regents Universities and the selected Vendor:

6.3.1 Accept a proposal as submitted by issuing a written notice to the selected Vendor which refers to this Request for Proposal and accepts the proposal received in response to it, or,

6.3.2 Enter into negotiations with one or more Vendor(s) in an effort to reach a mutually satisfactory written agreement that will be based on this Request for Proposal, the proposal submitted by the Vendor and the associated negotiations.

6.3.3 Because the University may use alternate 6.3.2 above, each Vendor should include in its proposal all requirements, terms or conditions it may have, and should not assume that an opportunity will exist to add or clarify such matters once the proposal is submitted.

6.4 **Termination / Non-appropriation of Funds**
Notwithstanding any other provisions, if funds anticipated for the continued fulfillment of the resulting agreement are at any time not forthcoming or insufficient, either through the failure of the Iowa Legislature or the Federal government to provide funds or alteration of the program under which funds were provided, then the University shall have the right to terminate the agreement without penalty by giving not less than thirty (30) days written notice documenting lack of funding.

6.5 **Assignment**
Any contractual agreement resulting from this Request for Proposal may not be assigned or transferred by the Vendor without prior written consent of the University and the bonding company if appropriate.

6.6 **Indemnification**
To the fullest extent allowed by law, Vendor agrees to indemnify and hold harmless the Regents Universities, the State of Iowa, and the Board of Regents, State of Iowa and their agents and employees from and against all claims or losses including reasonable attorneys’ fees, arising out of or resulting from the negligence or omissions of the Vendor, its partners, directors, officers, employees, licensees, subcontractors or agents, in the provision of products and services under this contract.

6.7 **Code of Fair Practice**
The Vendor shall not discriminate against any employee or applicant for employment because of race, creed, color, religion, national origin, sex, age, physical or mental disability. The Vendor shall take affirmative action to ensure that applicants are employed and that the employees are treated during employment without regard to their race, creed, color, religion, national origin, sex, age, physical or mental disability except where it relates to a bona fide occupational qualification.

6.8 **Qualifications of Bidder**

6.8.1 The University of Iowa may make such investigations as deemed necessary to determine the ability of the Vendor to provide and perform the specified service stated herein.
6.8.2 The Vendor shall keep informed of, and shall provide all permits and comply with all applicable laws, ordinances, rules, regulations and orders of the state and federal government, or public bodies having jurisdiction affecting this proposal and the service referenced herein.

6.9 Laws
Terms and provisions of this proposal and any agreement resulting from this proposal shall be construed in accordance with the laws of the State of Iowa, and any and all litigation or actions commenced in connection with this proposal or agreement resulting from this proposal shall be instituted in the appropriate courts of the State of Iowa.

6.10 Iowa Preference Law
As provided by Code of Iowa, Chapter 18, 23A, and 73 the University of Iowa shall give preference to purchasing Iowa products and purchasing from Iowa based businesses if the bids submitted are comparable in price to those submitted by other bidders and meet the required specifications.

6.11 Gratuities
The laws of the State of Iowa provide that it is a criminal offense to offer, promise or give anything of value or benefit to a state employee with the intent to influence that employee’s acts, opinion, judgment, or exercise of discretion with respect to that employee’s duties. Evidence of violation of this statute will be turned over to the proper prosecuting attorney.

6.12 Term of the Contract, Renewal, Cancellation, and Remedies upon Default

When this Request for Proposal is awarded, the resultant Bindery Services agreement will begin on or about October 1, 2011 and remain in effect for the succeeding thirty-six (36) months, through and including, September 30, 2014, unless earlier terminated. Thereafter, the contractual agreement may be extended for two (2) additional twenty-four (24) month periods, each upon the written mutual consent of the parties, for a potential seven year agreement. At the end of each contractual period the parties shall negotiate in good faith and any revisions or amendments to the agreement must be agreed to in writing by the Parties. Requests to extend the agreement must be exercised at least ninety (90) days prior to the expiration of the agreement. Prices submitted by the Binder in this RFP shall remain firm for the initial contract period of thirty-six (36) months and shall not be modified.

6.12.1 Prices may be re-negotiated at the start of an extension period but they must remain firm for the 24 months of that extension. A notice of intent to change prices for an extension period must be submitted in writing to The University of Iowa Purchasing Department and to each Library no later than May 1st, prior to the fiscal year that they would take effect. In the event that any change in price cannot be mutually agreed upon, the contract is subject to cancellation by either party at the end of the contract period.

6.12.2 The contract may be terminated by either party, at the start of a new contractual period, with notification to terminate no later than one hundred twenty (120) days prior to intended termination date. The agreement will also contain a cancellation clause for the Libraries any time within the first ninety (90) days of the initial contract, or either of the two extensions, should the Libraries determine the Binder’s performance is, or becomes, unsatisfactory.

6.12.3 In any case where the Vendor has failed to deliver services or has delivered non-conforming services, the University shall provide a 10 day right to cure notice. If the Vendor continues to be in default, the Regents Universities may procure substitute services from another source and charge the difference between the contractual price and the market price to the defaulting Vendor.
6.13 **IMPORTANT – Exceptions to Contract Documents**
The Vendor shall clearly state in the submitted proposal any exceptions to, or deviations from the specific RFP Instructions, Specifications, Form of Proposal, Evaluation Criteria, and/or any exceptions to these Terms and Conditions. Such exceptions or deviations will be considered in evaluating the proposals. Any exceptions must be noted on the Proposal Compliance Form, and returned with the submitted proposal. If additional copies of the Compliance Form are needed, the Vendor may make photocopies.

*Vendors are cautioned that exceptions taken to this Request for Proposal may cause their proposal to be rejected.*

6.14 **Insurance Requirements**
Without limiting any liabilities or any other obligations of the Vendor, Vendor shall provide certificates of insurance documenting the minimum insurance coverage requirements listed below unless otherwise agreed to in writing. Coverage may be by Vendor’s self-insurance plan or with outside insurance providers, all subject to University approval. Such insurance coverage must be maintained until all obligations under the Agreement are satisfied.

6.14.1 Applicable Workers Compensation insurance to cover liability imposed by Federal and State statutes having jurisdiction over Vendor employees engaged in the performance of the Vendor’s service. Employer’s Liability insurance of no less than $500,000 each employee and $500,000 each accident.

6.14.2 Commercial General Liability insurance with a minimum limit of ONE MILLION DOLLARS ($1,000,000) per occurrence. This policy shall include coverage for bodily injury and property damage, including completed operations, personal injury, coverage for contractual employees, blanket contractual and products and completed operations. Policy shall contain a severability of interests provision.

6.14.3 Commercial Automobile Liability insurance with a combined single limit for bodily injury and property damage of not less than ONE MILLION DOLLARS ($1,000,000) with respect to Vendor’s owned, non-owned, hired, or borrowed vehicles, assigned to or used in performance of this agreement.

6.14.4 The Commercial General Liability and Commercial Automobile Liability policies required herein shall be endorsed to include the State of Iowa; The University of Iowa; Iowa State University; The University of Northern Iowa; Board of Regents, State of Iowa, their agents, officials and employees as additional insured.

6.14.5 Vendor and its insurers providing the required coverages shall waive all rights of subrogation or recovery against the State of Iowa; The University of Iowa; Iowa State University; The University of Northern Iowa; Board of Regents, State of Iowa, their agents, officials and employees as additional insured.

6.14.6 All required insurance policies shall be issued by reputable insurance companies duly authorized to engage in the insurance business in the State of Iowa, with an A.M. Best’s rating of A-, VII or better. These policies shall be primary coverage. Certificates shall specify name of the project and provide that no less than 30 days notice of non-renewal, cancellation or material change shall be given to the University of Iowa.

6.14.7 Two (2) Certificates of Insurance showing Vendor’s current coverages and limits must be submitted with the Vendor proposal. Prior to a signed Agreement, Vendor must procure required insurance and provide University with two (2) Certificates of Insurance. Certificates must reference RFP # 10060 Vendor’s proposal must include the cost of the required insurance.
6.14.8 Failure on the part of the Vendor to procure or maintain required insurance shall constitute a material breach of contract upon which The University may immediately terminate an Agreement, or, at its discretion, procure or renew such insurance and pay any and all premiums in connection therewith, and all moneys so paid by The University shall be repaid by the Vendor to The University upon demand, or The University may offset the cost of the premiums against any moneys due to Vendor.

6.14.9 The University reserves the right to request and receive certified copies of any or all of the above policies and/or endorsements.

6.14.10 The University reserves the right to waive or reduce the insurance requirements at the University’s sole discretion.

6.15 Taxes
The University of Iowa is exempt from all excise, state, local and use taxes for services rendered, equipment or parts supplied for this contract. Exemption certificates will be furnished upon request.

6.16 Trade Secret or Proprietary Information

6.16.1 The laws of the State of Iowa require that at the conclusion of the selection process, the contents of all proposals will be placed in the public domain and be open to inspection by interested parties. Trade secrets or proprietary information that are recognized as such, and are protected by Iowa law may be withheld, if clearly identified as such in the proposal unless disclosure is required by a court order.

6.16.2 Failure to list all proprietary sections of the submitted proposal in the spaces provided in Section 7.3 shall relieve University personnel from any responsibility, should such information be accidentally released or viewed by a competitor or the public.

6.17 Targeted Small Business
The University is committed to the development of Targeted Small Businesses, a State of Iowa program. If subcontracting is necessary, the contractor will make every effort to use Targeted Small Businesses in the performance of this contract. A report will be required at the completion of the contract indicating the extent of Targeted Small Businesses participation. A description of the Vendor’s expected efforts to solicit Targeted Small Businesses participation should be enclosed with the proposal.

6.18 Miscellaneous Terms and Conditions
No individual, department, school, college or office at the University of Iowa has the authority to solicit or receive official proposals other than the Purchasing Department. All solicitation is performed under the direct supervision of the Director of Business Services and in accordance with University, Regent, State and Federal laws, policies, procedures and guidelines.

6.18.1 Most Favored Nation: The selected Vendor represents that the terms, conditions and prices established under the subsequent contract resulting from this Request for Proposal Number 10060 are equal to or better than those offered to other institutions, comparable universities, teaching hospitals, colleges, and/or community colleges. If during the term of the contract, the selected Vendor offers more favorable terms, conditions or prices to another institution, comparable universities, teaching hospitals, colleges and/or community colleges, the selected Vendor agrees to notify the University of Iowa. The contract resulting from this Request for Proposal shall be amended to reflect the more favorable terms, conditions or prices.
6.18.2 The University reserves the right to conduct discussions with Vendors, and to accept revisions of proposals, and to negotiate price changes. Any person, firm, corporation or association submitting a proposal accepts all the terms, conditions and requirements in this Request for Proposal.

6.18.3 The successful Vendor agrees it will not use the name or intellectual property, including but not limited to, University trademarks in any manner, including commercial advertising or as a business reference, without the expressed prior written consent of the University.

6.18.4 The successful Vendor shall not remove any records from the University of Iowa. This includes but is not limited to, paper documents, microfiche, microfilm, or any electronic media.
To: The University of Iowa
Purchasing Department
202 PCO
Iowa City, Iowa 52242-2500

7.1 The undersigned Binding Company, in response to Request for Proposal # 10060, having examined the General Information, Instructions to Vendors, Specifications / Vendor Requirement, Scope of Work / Vendor Response, Terms and Conditions, Evaluation Criteria / Method of Award, and, this Form of Proposal, all of which comprise the Contract Documents, hereby proposes to furnish Bindery Services in accordance with the Contract Documents, within the time set forth therein.

7.2 Binding Company acknowledges receipt of the following Addenda, which are a part of the Contract Documents:

    _______  _________  _________  _________  _________

7.3 The sections of this proposal listed below represent trade secrets, proprietary or confidential information. **Note: monetary sections of this proposal cannot be withheld as trade secret, proprietary or confidential information.**

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36
7.4 Academic Account References
The undersigned Binding Company provides the following academic account references as examples of the bindery services specified in Section 3 having been provided by the Binding Company within the last five (5) years. Three references should be for large academic accounts and the fourth for a smaller academic library with expenditure under $35,000 annually. The University of Iowa reserves the right to check additional sources or make any further investigations deemed necessary.

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7.5 The Binding Company states that full compliance with the Contract Documents is maintained in this proposal, unless otherwise stated on Attachment C, Proposal Compliance Form, submitted in response to this Request for Proposal # 10060.

7.6 The Binding Company understands that The University of Iowa reserves, solely, the right to reject any or all proposals, to waive irregularities, defect, or technicalities in any proposal, and to accept any proposal, in whole or in part, that it deems to be in the best interests of the Regents Institutions.

7.7 The Binder agrees their proposal is an offer to The University of Iowa that may not be amended or withdrawn for a period of one hundred twenty (120) calendar days after the opening of the proposals.
7.8 Requirements Checklist
To assist in preparing the proposal, vendors are reminded that the following items are to be included with the proposal. Vendors should check each item that follows to indicate that the items are included with their proposal.

- A signed and completed Form of Proposal.
- Compliance with all items listed in Section 3 Specifications / Vendor Requirements.
- Complete detailed responses in numeric order to all requested information and questions included in Section 4 Scope of Work / Vendor Questions.
- Attachment A Proposal Certification Form completed and signed.
- Any and all exceptions to the terms, conditions, and specifications of Request for Proposal # 10060 listed and clearly explained on the Proposal Compliance Form, Attachment C.
- Submission of all samples requested. Binder must provide two samples of each work listed below, and may include two samples of other products not listed. All samples must be labeled and identified as previously detailed in this Request for Proposal. **All samples submitted will become the property of The University of Iowa Library.**
  - DFA text block, please include bindery label or stamp at the back of the book
  - DFA text block with clay-coated, glossy paper
  - Text block fitted with a new case only (original sewing retained)
  - Oversewn text block
  - Sewn-thru-the-fold by machine
  - Sewn-thru-the-fold by hand
  - Selection of portfolios and boxes typical of those made by the Binder
  - Image or picture or digi cover DFA
  - Image or picture or digi cover retain original sewing
  - Two samples of each type of end sheet used by the Bindery
  - If automated binding equipment such as Mek-A-Case or Ultrabind, provide two samples from each
  - Music (lay flat) with pocket for parts
  - Preservation facsimile volume (“Preservation photocopy”)
- Samples of digitization including:
  1. Multiple standard printed pages with a mix of text and gray-scale image either half-tone or continuous tone as TIFF
  2. Multiple standard printed pages with a mix of text and gray-scale image either half-tone or continuous tone as PDF with OCR optimized for web viewing
  3. Large-format (over 11”x18”) full color TIFF (e.g. large map)
  4. Several examples of microfilm (one-up and two-up examples)
- Submission of samples of any innovative products of the Binder that meets or exceeds the NISO/LBI Standard for Library Binding or other appropriate standards including, but not limited to, possibilities for brittle book replacement services. Again, two samples of these “innovative” products must be submitted under the terms outlined above. **All samples submitted will become the property of The University of Iowa Library.**
- Submission of three sample treatment reports: one for a paper conservation treatment, a simple book conservation treatment, and one complex book conservation treatment with
sample photo documentation for all three reports.

List of commonly used conservation repair materials, specifying brand or supplier and product name.

Balance sheet/financial statements, showing that the Binding Company has been in business continually for the last five (5) years. Also include the most recent annual report.

Certificates of insurance per Section 6.14.7.

All bid price areas that are included on Attachment D: Proposal Price Schedule completely filled out and submitted with proposal.

Academic Account References listed in Section 7.4.

All Proprietary Information listed in Section 7.3.

Acknowledgement of receipt of any Addenda noted in Section 7.2.

Demonstration of a proven Automated Bindery Preparation and Records System accompanied by a sample of written operating instructions and/or manual per Section 3.5.

7.9 Automated System and Conversion Services References
The Binding Company must provide names of three (3) large academic accounts who have utilized their automated system, including address, name of contact person, phone number, and email address. The Binding Company must also include a site reference where existing online binding records were converted to the Binder’s system.

NOTE: All Vendors must have an online system in order to qualify for this proposal.

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7.10  The vendor hereby certifies by signing below that:

1. This proposal is genuine and is not made in the interest of or on behalf of any undisclosed person, firm or corporation.
2. The Vendor has not altered or modified the original content of the Request for Proposal document or any associated documents, including original drawings or graphics.
3. The Vendor has not directly or indirectly induced or solicited any other Vendor to put in a false or sham proposal.
4. The Vendor has not solicited or induced any person, firm or corporation to refrain from bidding.
5. The Vendor has not sought by collusion or kickback to obtain any advantage over any other Vendor or over The University of Iowa.
6. Their firm ______IS, or ______IS NOT currently debarred, suspended, or proposed for debarment by any federal or state entity. The undersigned agrees to notify The University of Iowa of any change in this status, should one occur, until such time as an award has been made under this procurement.

Check one of the following:

(___) There is no officer or employee of The University of Iowa who have, or whose relative has, a substantial interest in any contract award subsequent to this proposal.

(___) The names of any and all public officers or employees of The University of Iowa, Iowa State University, The University of Northern Iowa, or the Board of Regents, State of Iowa who have, or who’s relative has, a substantial interest in any contract award subsequent to this proposal are identified by name as a part of this submittal.

In compliance with Request for Proposal # 10060 for Regents Library Bindery Services and all terms, conditions and requirements contained therein, the undersigned agrees to furnish such goods/services in accordance with the Scope of Work / Vendor Questions, Detailed Specifications, and Standard Terms and Conditions, unless otherwise stated on the Proposal Compliance Form (Attachment A).

Vendor’s Business Name:__________________________________________________________

Official Business Address:________________________________________________________

________________________________________________________

________________________________________________________

Federal Tax Identification Number:_______________________________________________

Firm's State of Residence:________________________________________________________

Authorized Signature:____________________________________________________________

Name, Printed or Typed:____________________________________________________________
Title:__________________________________________________________
Date:__________________________________________________________
Telephone Number:______________________________________________
FAX Number:____________________________________________________
Vendor's Representative(s) to contact regarding this proposal:
________________________________________________________________
Representative’s Telephone Number:_______________________________
Representative’s Fax Number:______________________________________
Representative’s Email Address:____________________________________
ATTACHMENT A PROPOSAL CERTIFICATION

The University of Iowa
Purchasing Department
202 PCO
Iowa City, Iowa 52242-2500

The undersigned certifies that to the best of her/his knowledge: (check one)

___ There is no officer or employee of the Regent institutions who have, or whose relative has, a substantial interest in any contract award subsequent to this proposal.

___ The names of any and all public officers or employees of the Regent institutions or the Iowa Board of Regents who have, or who’s relative has, a substantial interest in any contract award subsequent to this proposal are identified by name as part of this submittal.

The undersigned further certifies that their firm (check one) ___ IS, or, ___ IS NOT currently debarred, suspended, or proposed for debarment by any federal or state entity. The undersigned agrees to notify The University of Iowa Purchasing Department of any change in this status, should one occur, until such time as an award has been made under this procurement action.

In compliance with the Request for Proposal # 10060 for Regents Library Bindery Services at The University of Iowa, Iowa State University and The University of Northern Iowa, after carefully reviewing all the terms, conditions and requirements contained therein, the undersigned agrees to furnish such goods/services in accordance with the Specifications, Scope of Work / Vendor Response, and Standard Terms & Conditions.

Firm: __

Address: ________________________________

______________________________________

______________________________________

______________________________________

Phone Number: _________________________

Fax Number: ___________________________

By: _________________________________

Title: ________________________________

Federal ID Number: ___________________
Fax the following letter by May 11, 2011.
Fax Number: (319) 353-2358

To: Sherri Dusenbery
   The University of Iowa
   Purchasing Department
   202 PCO
   Iowa City, Iowa 52242-2500

Check One

_____ Yes, my company will respond to the Request for Proposal # 10060, Regents Library Bindery Services for The University of Iowa, Iowa State University and The University of Northern Iowa.

_____ No, my company will not respond to the Request for Proposal # 10060, Regents Library Bindery Services for The University of Iowa, Iowa State University and The University of Northern Iowa.

Check One

_____ Yes, my company has questions or relating to Request for Proposal # 10060, Regents Library Bindery Services for The University of Iowa, Iowa State University, and The University of Northern Iowa. These questions are attached.

_____ No, my company does not have questions or clarification requests relating to Request for Proposal # 10060, Regents Library Bindery Services for The University of Iowa, Iowa State University, and The University of Northern Iowa.

All questions by the vendors concerning this RFP must be faxed to The University of Iowa Purchasing Department by June 11, 2011.

Please indicate your company name as well as the name, phone number, fax number, and E-mail address of the person(s) representing your company to whom question responses and any other correspondence relating to this RFP should be sent.

Company Name: _______________________

Contact Name: _______________________

Phone: _______________________

Fax: _______________________

Email: _______________________
Note: Additional copies may be made as necessary.

I hereby certify total compliance with all terms, conditions and specifications of this Request for Proposal (RFP) # 10060, except as expressly stated below.

<table>
<thead>
<tr>
<th>RFP Item Number</th>
<th>Comments</th>
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Signature:________________________________________

Name, Printed or Typed:____________________________________

Date:____________________________________________________
**ATTACHMENT D  PROPOSAL PRICING SCHEDULE**

**Description of Commodity or Service**
If turnaround time affects pricing, please provide separate quotes for each frequency (two weeks, three weeks, etc.).

<table>
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<th>Price</th>
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1. Serials up to and including 16” in height, 3” in thickness or less, standard collation, all lettering included:

   | Sewn through the fold leaf attachment: | $  |
   | Double-fan adhesive leaf attachment:   | $  |
   | Oversewn leaf attachment:             | $  |

2. Serials up to and including 16” in height, 3” in thickness or less, economy collation, all lettering included:

   | Sewn through the fold leaf attachment: | $  |
   | Double-fan adhesive leaf attachment:   | $  |
   | Oversewn leaf attachment:             | $  |

3. Monographs up to and including 12.5” in height, 2.5” in thickness or less, no trim, all lettering included:

   | Recase—original sewing intact, sewn endsheets: | $  |
   | Repair sew-thru-fold, sewn endsheets, and new case: | $  |
   | Double-fan adhesive leaf attachment: | $  |
   | Oversewn leaf attachment: | $  |

4. Economy paperback binding, C/C-1 grade cloth case, up to and including 12” in height, 10” in width, and 1.5” in thickness, all lettering included:

   | Double-fan adhesive leaf attachment: | $  |
   | Recase—retention of original sew-thru-fold: | $  |

5. Economy paperback, image or picture or digi cover from cover, or covers laminated or encased in polyester film, up to and including 12” in height, 10” in width, and 1.5” in thickness:

   | Double-fan adhesive leaf attachment: | $  |
   | Recase—retention of original sew-thru-fold: | $  |

6. Theses, up to and including 11” in height, lettering included:

   | Double-fan adhesive leaf attachment: | $  |
   | Oversewn: | $  |

7. Music books (lay flat structure), all lettering included:

   | Recase—original sewing intact, sewn endsheets: | $  |
   | Repair sew-thru-fold, sewn endsheets, and new case: | $  |
   | Double-fan adhesive leaf attachment: | $  |
   | Oversewn leaf attachment: | $  |

8. Music pocket case, nothing bound in, buckram cover, all lettering included. | $  |

9. Pamphlet binding, single-signature sewn through the fold, clear front, no lettering, up to and including 12” in height. | $  |
10. Portfolios up to and including 12” in height. $______

11. Cloth covered clam shell or double-tray book boxes up to and including 12” in height. $______

12. Machine cut corrugated board clam-shell box up to and including 12” in height, all lettering included. $______

13. Phase boxes up to and including 12” in height, held closed by waxed linen cord or unbleached cotton ties and rivets, all lettering included:
   Constructed of grey / white barrier board: $______
   Constructed of lignin-free board: $______

14. Tuxedo boxes with tab-slot closure, constructed of 10- or 20-point lignin-free stock, all lettering included, up to and including 12” in height. $______

15. “Print on Demand” Printing from an electronic file and binding.
   Per page bitonal: $______
   Per page gray-scale: $______
   Per page color: $______
       Binding: $______
       Flat rate: $______

   Per page bitonal: $______
   Per page gray-scale: $______
   Per page color: $______
       Binding: $______
       Flat rate: $______

17. Per page cost for preservation facsimile pages 8.5” x 11”:
   Bitonal: $______
   Gray-scale: $______
   Color: $______

18. Per page cost for preservation facsimile pages over 8.5” x 11”:
   Bitonal: $______
   Gray-scale: $______
   Color: $______

19. Per page digitization only of pages 8.5” x 11” or less @ 600 ppi:
   Bitonal: $______
   Gray-scale: $______
   Color: $______

20. Per page digitization only of pages up to 11” x 17” @ 600 ppi:
   Bitonal: $______
   Gray-scale: $______
   Color: $______
21. Per page digitization only of pages up to 18” x 36” @ 400 ppi:
   Bitonal: $_______
   Gray-scale: $_______
   Color: $_______

22. Per page digitization only of pages up to 25” x 36” @ 300 ppi:
   Bitonal: $_______
   Gray-scale: $_______
   Color: $_______

23. Cost of receiving an electronic file (TIFF and/or PDF) $_______

24. Per frame digitization of microfilm $_______

25. Per hour conservation charges $_______

26. Treatment documentation delivered on computer media $_______

27. Up-charge per inch for mending paper tears using transparent pressure-sensitive alkaline paper mending tape. $_______

28. Up-charge for mending paper tears using Japanese paper and alkaline, water-reversible adhesive, or archival quality heat-set tissue per inch. $_______

29. Up-charge per pocket for map or music pockets. $_______

30. Up-charge per construction for insertion of tabbed pocket part or supplement. $_______

31. Stubbing: per-stub section, regardless of thickness. $_______

32. Up-charge per device for insertion or removal of library-applied theft detection device. $_______

33. Up-charge per volume for hand sewing. $_______

34. Up-charge per volume for “rush” work. $_______

35. Up-charge for monographs for hinging in paper covers with tissue or cloth for all leaf attachment types. Specify hinge material. $_______

36. Charge per hour or fraction thereof for extra work or special processing not listed above (itemize); hours and type of work to be stated on invoices. $_______

37. Oversize up charges per inch:
   - Serials over 16” $_______
   - Monographs over 12.5” $_______
   - Portfolios over 12” $_______
   - Double-tray boxes over 12” $_______
   - Phase boxes over 12” $_______
38. Music parts bound in folio endsheets $______
39. Book to match $______
40. Panel lines, per volume $______
41. Copied and printed endsheets, each $______
42. Box and Bind $______

**Additional Up-charges (please list service and cost):**
Description and charge per volume of binding services and treatments not listed above (itemize); service and charge to be stated on invoices.

________________________________________________________________________ $______
________________________________________________________________________ $______
________________________________________________________________________ $______
________________________________________________________________________ $______
________________________________________________________________________ $______
________________________________________________________________________ $______
________________________________________________________________________ $______
ATTACHMENT E

CONTRACT PERFORMANCE AND PAYMENT BOND FORM

KNOW ALL MEN BY THESE PRESENTS, that we, the undersigned,

of _______________________________________________________________________

(hereinafter called the "Principal"), a ____________________________ * duly authorized by law to do
business in the state of Iowa, and

(hereinafter called the "Surety"), a corporation duly authorized to do a surety business under the Laws of
the state of Iowa, are held and firmly bound unto the Board of Regents, State of Iowa (hereinafter called
the "Obligee"), in the penal sum of ___________________________ Dollars ($________), lawful money
of the United States, for the payment of which well and truly to be made unto the said Obligee, we bind
ourselves, our heirs, executors, administrators, successors, and assigns jointly and severally, firmly by
these presents, as follows:

The conditions of this obligation are such that, whereas on the ______ day of ________, ________,
the said Principal entered into a written Agreement with Obligee for *************** as set forth in
detail in the Notice to Vendors, Scope of the Work, Proposal Instructions, Standard Terms and Conditions
of the Contract, Detailed Specifications, Evaluation Criteria, Proposal Requirements, Form of Proposal,
and other related Contract Documents referred to in said Agreement, all of which are hereby made a part
hereof as if written herein at length.

NOW, THEREFORE, If the said Principal shall well and truly perform and complete said project in strict
accordance with said Agreement including completion within the time limits specified, together with full
compliance with other requirements set forth by Notice to Vendors, Scope of the Work, Proposal
Instructions, Standard Terms and Conditions of the Contract, Detailed Specifications, Evaluation Criteria,
Proposal Requirements, Form of Proposal, and other related Contract Documents referred to in said Agreement, all of which are hereby made a part hereof as if written herein at length.

The Principal and the Surety on this bond hereby guarantee the full performance of said Agreement by the
Principal and hereby covenant and agree to save the Obligee harmless from any and all defaults or failures
of the principal to so perform, and to pay, to the extent of the amount of this bond, any and all damages
occasioned to the Obligee by the failure of the Principal to fully perform as required under his Contract.

* One word corporation, partnership or individual - depending on the nature of the Principal should be
entered here.
This obligation is made for the use of said Obligee and also for the use and benefit of all persons who may perform any work or labor or furnish any material in the execution of said Agreement and may be sued on thereby in the name of said Obligee. The Principal and Surety on this bond hereby agree to pay to all persons, firms, or corporations having contracts directly with the Principal or with subcontractors all just claims due them for labor performed or material furnished in the performance of the contract on account of which this bond is given.

Principal and Surety shall not be liable to said persons, firms, or corporations unless the claims of said claimants against said portion of the contract price shall have been established as provided by law.

Every Surety on this bond shall be deemed and held, any contract to the contrary notwithstanding, to consent without notice:

a. To any extension of time to the Vendor in which to perform the contract.

b. To any change in the plans, specifications, or contract, when such change does not involve an increase of more than twenty percent of the total contract price, and shall then be released only as to such excess increase.

IN TESTIMONY WHEREOF, The parties hereunto have caused the execution hereof in two (2) original counterparts as of the ______________ day of ______________, 20__

(SEAL)

Attest: Principal

Signed By ____________________________
Name & Title ____________________________

(SEAL)

Attest: Surety

Signed By ____________________________
Name & Title ____________________________

Countersigned:

__________________________
Iowa Resident Agent as Attorney-in-Fact

Mailing Address ____________________________

__________________________________________
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<tr>
<th>Fiscal Year</th>
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<th>Iowa State Univ.</th>
<th>Univ. of Northern Iowa</th>
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APPENDIX II  LIBRARIES AUTHORIZED REPRESENTATIVES

The University of Iowa: Nancy E. Kraft,
Head - Preservation Department

The University of Iowa Law Library: Karen Nobbs,
Manager – Collection Access Department

Iowa State University: Hilary Seo,
Head - Preservation Department

The University of Northern Iowa: Cynthia Coulter,
Head - Technical Services
APPENDIX III  SPECIFICATIONS LIMITED TO A SINGLE INSTITUTION

A. The University of Iowa

1. Monographic color selection.
The Library permits the Binder to select the cloth color for monographic titles, except for multi-volume sets in which case the Library shall select the Binder’s color that most closely matches the original cover.

2. Request trimming of all head edges to a maximum of 1/8 inch. Requests trimming of all serials and continuations, with heads, fore-edges, and tails of text trimmed as slightly as possible (a maximum of 1/8/ inch) and under no circumstances shall printed matter be trimmed. Volumes in which text and/or illustrations bleed to the edges of pages shall be left untrimmed. Trimming shall not be used to remove staples from a side stapled volume; they shall be carefully pulled from the item instead.

B. The University of Iowa Law Library

1. Monographic color selection.
The Library will provide color selection for all monographs.

2. Detection Strips.
The Library does require the insertion of detection strips.

3. Lettering.
The order of priority for placement of call numbers on the covers of classified volumes is:
   a. (1) in horizontal lines on the spine and,
   b. (2) if volumes are too thin for the text to be placed on the spine horizontally, in horizontal lines on the UPPER left-hand corner of the front cover near the spine.

C. The University of Northern Iowa

1. Detection Strips.
The Library does not require the insertion of detection strips.

The Library permits the Binder to specify the cloth color for monographic titles, if not specified by the Library.

3. The Library can accept invoices via EDI transmission.

4. Request trimming of all head edges to a maximum of 1/8 inch. Requests trimming of all serials and continuations, with heads, fore-edges, and tails of text trimmed as slightly as possible (a maximum of 1/8/ inch) and under no circumstances shall printed matter be trimmed. Volumes in which text and/or illustrations bleed to the edges of pages shall be left untrimmed. Trimming shall not be used to remove staples from a side stapled volume; they shall be carefully pulled from the item instead.
D. Iowa State University

1. Detection Strips.
   The Library does require the insertion of detection strips.

   The Library permits the Binder to select the cloth color for monographic titles
   except for selected individual volumes for which a color shall be specified by
   the Library, and multi-volume sets, in which case the Library shall select the
   cloth color.

3. Leaf attachment preferences.
   For monographs: 1) retain original sewing, new case only, 2) double-fan adhesive with
   spine edge of text block milled, 3) oversewing.
   For serials: 1) sew-thru-fold for saddle stapled or mix of saddle staple and adhesive
   bound issues, 2) double-fan adhesive for adhesive bound issues only, with spine edge of
   text blocks milled and notched if necessary, 3) oversewing.

4.Trimming.
   The Library requests no trim unless absolutely necessary.