



U N I V E R S I T Y O F
SOUTH CAROLINA

AMENDMENT NO. 2 TO SOLICITATION

TO: ALL VENDORS

FROM: Charles Johnson, Procurement Manager

SUBJECT: SUBJECT: SOLICITATION NUMBER: USC-RFP-2043-CJ
SALES, WAREHOUSING, DISTRIBUTION, AND ACCOUNT MANAGEMENT OF NATIONAL
RESOURCE CENTER FOR THE FIRST-YEAR EXPERIENCE & STUDENTS IN TRANSITION (NRC)
PUBLICATIONS

DATE: September 14, 2011

This Amendment No.2 modifies the Fixed Price Bid only in the manner and to the extent as stated herein.

BIDDER SHALL ACKNOWLEDGE RECEIPT OF AMENDMENT NO. 2 IN THE SPACE PROVIDED BELOW AND RETURN IT WITH THEIR BID RESPONSE. FAILURE TO DO SO MAY SUBJECT BID TO REJECTION.

Authorized Signature

Name of Offeror

Date

THE FOLLOWING QUESTIONS WERE RECEIVED FROM VENDOR A:

QUESTION #1: The RFP does not indicate if/how any existing inventory will be transferred from NRC to contractor. Will any existing inventory be transferred to contractor? If yes, will USC/state arrange transfer/shipment? Will contractor be involved in inventory pickup and/or shipment to new contractor location? Should it be included in RFP pricing response as part of scope? As an option?

ANSWER: The Contractor will work with the NRC to devise a plan for transfer of the NRC's current inventory to the Contractor's warehouse facility. If the contractor is located within 100 miles of the NRC, it is expected that the contractor will manage the transfer of inventory via local ground transport. For any contractor outside of this geographic area, inventory transfer may occur via commercial freight carrier or common carrier, depending upon cost effectiveness. Estimates for inventory transfer should be included in the business proposal. All plans and budgets for inventory transfer must be approved by an authorized representative of the NRC.

QUESTION #2: We are a resident taxpayer, so form I-312 does not apply to us. Do we return form I-312 with the package and indicate N/A on form or do we exclude form when we return submission package?

ANSWER: Because you are a resident taxpayer and subsequently the form I-312 doesn't apply to you, there is no need for you to return the form I-312 with the proposal you submit. However, if you choose to return the form I-312 with the proposal you submit, you can either leave it blank or indicate N/A (Not Applicable) on the form.

THE FOLLOWING QUESTIONS WERE RECEIVED FROM VENDOR B:

QUESTION #1: After reviewing the RFP, it is understood that the submission requirements include:

- 1 original version in hardcopy format
- 5 copies in hardcopy format
- 1 electronic version on CD in MS Word
- 1 redacted original version in hardcopy format
- 1 redacted electronic version in PDF format

Please confirm that this is correct.

ANSWER: The submission requirements are:

- **1 original version of your offer in hardcopy format.**
- **5 copies (marked 'COPY') of the original in hardcopy format.**
- **1 electronic version of the original version of your offer on compact disk (CD) in MS Word 97 or later file format; refer to the Magnetic Media – Required**

Format clause in Section II. Instructions To Offerors – B. Special Instructions of the solicitation.

- **1 redacted original version of your offer in hardcopy format.**
- **1 electronic version of the redacted original version of your offer on compact disk (CD) in Portable Document Format (.pdf) file format; refer to the Submitting Redacted Offers clause in Section II. Instructions To Offerors – A. General Instructions of the solicitation.**

QUESTION #2: It is understood that the Solicitation number and opening date must be indicated on the package exterior. Is the Opening Date 9/19/11?

ANSWER: On the cover page of the solicitation, the Submit Offer By (Opening Date) is September 19, 2011. Unless the University decides to extend the Submit Offer By (Opening Date) in an amendment to the solicitation, the Opening Date for the solicitation is September 19, 2011.

QUESTION #3: The last page of the solicitation is a Nonresident Taxpayer Registration Affidavit. Am I correct that this document is only required if the work will be completed in South Carolina?

ANSWER: No. The NonResident TaxPayer Registration Affidavit Income Tax Withholding is required for all nonresident taxpayers of the State of South Carolina. Therefore, if your company/firm is not a Resident TaxPayer of the State of South Carolina, the NonResident TaxPayer Registration Affidavit Income Tax Withholding (i.e. Form I-312) applies. If your company/firm is not a Resident TaxPayer of the State of South Carolina, then it will need to complete and sign the , the NonResident TaxPayer Registration Affidavit Income Tax Withholding (i.e. Form I-312) and include it with the offer (i.e. proposal) it submits in response to the solicitation.

QUESTION #4: Is there any required precertification within the state of South Carolina in order to submit a proposal? If so, please describe?

ANSWER: No, there is no required precertification within the State of South Carolina in order to submit an offer (i.e. proposal) in response to the solicitation.

QUESTION #5: What system is utilized to manage the publication and subscription programs currently?

- Would this system be available to access remotely for order processing functions?

ANSWER: Customers use pdf order forms, direct mail order forms, and an online order form (supported by PHP Runner) to submit orders via fax, U.S. mail, or e-mail. Sales are manually keyed into the NRC sales database (FileMaker Pro 7) from order forms. The online order form PHP Runner captures customer registration data (i.e., name, address, e-mail, phone) and sales history. PHP Runner is not currently used to process online credit card sales because of University restrictions on ecommerce applications. The NRC can provide remote access to the PHP Runner database. Due to University security regulations, remote access to NRC sales database (FileMaker Pro 7) cannot be provided. Data can be exported from the NRC sales database as a CSV file upon request.

QUESTION #6: What percentages of orders are processed through the website?

ANSWER: Currently, the NRC does not have an online shopping cart. Customers can fill out an order form online, but the form cannot be submitted via the web site. All orders are currently received via fax, e-mail, or U.S. mail. Contractor must be able to support online order submission and payment processing.

QUESTION #7: How many customer service transactions are processed annually? (Calls and emails are received per year that does not result in an immediate order?)

ANSWER: The NRC does not currently track customer service calls. The number of calls received not resulting in an order is minimal.

QUESTION #8: How many pallets of inventory are currently stored?

ANSWER: The NRC currently has 29 pallets of material. In addition, inventory is currently stored on seven steel shelving units (approximately 6' x 3' each).

QUESTION #10: Can USC provide samples of the current reports?

ANSWER: Current reports span several different systems. Details for information desired in specific reports follows:

- **Monthly sales report**
 - **Date range for report**
 - **Item number or ISBN**
 - **Title**
 - **Number of copies sold for each item at each price point**
- **Monthly inventory report**
 - **Date range for report**
 - **Item number or ISBN**
 - **Title**
 - **For each item:**

- Number of copies sold
 - Number of copies shipped to the NRC at its request
 - Number of damaged items removed from inventory
 - Number of new inventory received
 - Number of items returned to inventory
- **Monthly customer data report**
 - Date range for report
 - Name
 - Position Title
 - Institution
 - Business Address (i.e., street address, city, state/province, country, postal code)
 - Business e-mail (if available)
 - Phone number
- **Weekly subscription data report (for *Journal of The First-Year Experience & Students in Transition* only); data for end user of subscription rather than purchasing agent**
 - Date range for report
 - Name
 - Position Title
 - Institution
 - Business Address (i.e., street address, city, state/province, country, postal code)
 - Business e-mail (if available)
 - Phone number
 - MetaPress ID (if provided)
 - Number of issues purchased
 - New subscription or renewal
 - Type of subscription (i.e., individual, institutional, U.S., non-U.S.)
- **Periodic customer data reports for select titles; provide customer data for purchasers of select title(s) for a specified date range**
 - Name
 - Position Title
 - Institution
 - Business Address (i.e., street address, city, state/province, country, postal code)
 - E-mail (if available)
 - Phone number

The reporting needs of the NRC are not necessarily limited to the above. The NRC may request additional reports as the need arises.

QUESTION #11: Is the selected vendor going to be managing the subscription data, mailing renewal, and sending back-issues?

ANSWER: The NRC is evaluating the ability of Contractors to manage subscriptions for the *Journal of The First-Year Experience & Students in Transition* (to include managing data, mailing renewal notices, fulfilling current subscriptions, and sending back issues upon request) as an optional service. Decisions to award the service to Contractor will be based on budgetary considerations.

If the NRC elects not to award subscription management as part of this contract, it will retain responsibility for managing subscriptions, renewals, and all fulfillment requests. The NRC reserves the right to outsource this operation to a vendor of its choosing in the future.

QUESTION #12: Are the back-issues of the journals included the 46 titles? If not, how many titles are there and total number of pallets?

ANSWER: Inventory of back issues of the *Journal of The First-Year Experience & Students in Transition*:

Volume 1	No. 1	11	Volume 13	No. 1	10
Volume 1	No. 2	10	Volume 13	No. 2	0
Volume 2	No. 1	5	Volume 14	No. 1	10
Volume 2	No. 2	11	Volume 14	No. 2	6
Volume 3	No. 1	11	Volume 15	No. 1	3
Volume 3	No. 2	11	Volume 15	No. 2	5
Volume 4	No. 1	11	Volume 16	No. 1	25
Volume 4	No. 2	11	Volume 16	No. 2	10
Volume 5	No. 1	11	Volume 17	No. 1	0
Volume 5	No. 2	1	Volume 17	No. 2	7
Volume 6	No. 1	10	Volume 18	No. 1	0
Volume 6	No. 2	11	Volume 18	No. 2	4
Volume 7	No. 1	11	Volume 19	No. 1	17
Volume 7	No. 2	11	Volume 19	No. 2	8
Volume 8	No. 1	12	Volume 20	No. 1	0
Volume 8	No. 2	12	Volume 20	No. 2	7
Volume 9	No. 1	12	Volume 21	No. 1	14
Volume 9	No. 2	13	Volume 21	No. 2	39
Volume 10	No. 1	10	Volume 22	No. 1	9
Volume 10	No. 2	14	Volume 22	No. 2	19
Volume 11	No. 1	12	Volume 23	No. 1	<50*
Volume 11	No. 2	13			

* will decrease

Volume 12	No. 1	12
Volume 12	No. 2	14

QUESTION #13: What are the two electronic file feeds – monthly purchases/customer history and Weekly Subscription data used for? Are the files only to include data since the last data transfer or cumulative data?

ANSWER: Weekly and monthly reports are to include data since last data transfer. Periodic reports include data for a specified date range. Intended uses for specific reports include:

- **Monthly sales report**
 - Track profit/loss for individual titles
 - Calculate revenue share/royalty payments for individual titles
 - Set priorities for future marketing efforts
- **Monthly inventory report**
 - Determine need for reprints
 - Set priorities for future marketing efforts
 - Track damaged items to gauge need for prorated refunds from printing vendors
- **Monthly customer data report**
 - Populate NRC customer database for marketing NRC events, products, and services
- **Weekly subscription data report (for *Journal of The First-Year Experience & Students in Transition* only); data for end user of subscription rather than purchasing agent**
 - Set up new subscription
 - Set up online access
- **Periodic customer data reports for select titles; provide customer data for purchasers of select title(s) for a specified date range**
 - Create custom mailing lists to market new titles/events to past customers

The reporting needs of the NRC are not necessarily limited to the above. The NRC may request additional reports as the need arises.

QUESTION #14: What is the MetaPress ID Number and how is it assigned?

ANSWER: Online access to the *Journal of The First-Year Experience & Students in Transition* is provided by MetaPress, a division of EBSCO. The MetaPress ID or activation code is assigned by the MetaPress client (e.g., the NRC) when a subscriber purchases online access to a MetaPress-supported journal for the first time. The NRC checks new subscribers against the MetaPress database for a current account and assigns an activation code for any new MetaPress users. Current NRC order forms for

the *Journal of The First-Year Experience & Students in Transition* request MetaPress ID; collection of these data during the sales process streamlines online account activation for new users.

QUESTION #15: What is the budget for the program?

ANSWER: The NRC is evaluating proposals based on the best value for the range of services offered.

QUESTION #16: Fixed Rate Contract

- Is this a fixed annual fee or fixed unit rate charges?
- If fixed annual fee, how are supplies and postage considered?
- Are Service Contract Rates applicable to this project?
- Would USC consider a labor hour and material contract?

ANSWER: Yes, this solicitation is for a fixed annual fee contract. Please refer to the Fixed Pricing Required clause in Section VII. Terms and Conditions – A. General of the solicitation. For the fixed annual fee it proposes to the University, the offeror's fixed annual fee shall include all costs to the University for offeror's proposed solution for the Essential Services defined in Section III Scope of Work / Specification of the solicitation. Service Contract Rates are applicable to contract work to be performed if and only if offeror's fixed annual fee is based on its proposed service contract rates and its proposed number of hours necessary to perform each of the contract services defined in Section III Scope of Work / Specification of the solicitation. No, the University will not consider a labor hour and material contract for this solicitation.

QUESTION #17: What are the typical contract payment terms for USC?

ANSWER: Net 30. Also, please refer to the Payment & Interest clause in Section VII. Terms and Conditions – A. General of the solicitation.

QUESTION #18: The selected vendor will provide publication and product customer service, order processing, and fulfillment as the main part of the project. If budget allows, the vendor may also be selected to provide subscription management for new and renewing orders, customer service, issue releases, etc. Is this correct?

ANSWER: Yes, the primary services sought in this RFP are sales, warehousing, distribution, and account management for the NRC's publications (primarily books and guides), which may also include sales of the *Journal of The First-Year Experience & Students in Transition*. If the Contractor can provide subscription management and fulfillment for the *Journal* at an additional cost within the NRC's publications

operating budget, the Contractor may be awarded subscription management and fulfillment services in addition to the primary services.

If the NRC elects not to award subscription management as part of this contract, it will retain responsibility for managing subscriptions, renewals, and all fulfillment requests. The NRC reserves the right to outsource this operation to a qualified vendor of its choosing in the future.

QUESTION #19: Regarding Subscriptions?

- How is the subscription program currently managed?

ANSWER: Subscription data for the Journal is maintained in the NRC sales database (i.e., FileMaker Pro). Issues remaining are reduced manually with the release of a new issue. Early renewals are held until current subscription expires.

- How many copies of the journal are shipped per release?

ANSWER: Approximately 580 copies are mailed to subscribers twice a year (i.e., November and April).

- What are the specifications of the journal? Please include dimensions, average page count, full color or black/white, average weight, etc.

ANSWER: The Journal has a trim size of 6x9” and is perfect bound. The cover is one-color with bleeds and the inside pages are printed black and white with some bleeds. Each issue averages about 120 pages and weighs approximately 10 ounces.

- Which renewal efforts are mailed or emailed?

ANSWER: When the final issue of the subscription is mailed, a Renewal Order Form (see attached sample in this amendment) is enclosed for those customers who do not subscribe through a subscription agent, such as EBSCO. EBSCO manages renewals for its customers and has requested that we not send a Renewal Order Form to the end user. Approximately 3 months later, (the mid-point between issues), the NRC sends a follow-up e-mail to lapsed subscribers (see attached sample in this amendment) with a Renewal Order Form. At the same time, the NRC also sends an e-mail to individual I subscription agents, notifying them of mutual customers who have not yet renewed.

- In the renewal package:
 - a. Is the letter and order response form personalized?
 - b. Are they both printed black and white on letterhead, single sided?
 - c. Can samples be provided?

ANSWER: See answer to question above regarding which renewal efforts are mailed or emailed.

- What percentage of subscription orders and renewals are managed on the website?

ANSWER: Currently, the NRC does not have an online shopping cart. Customers can fill out an order form online, but the form cannot be submitted via the web site. All orders are currently received via fax, e-mail, or U.S. mail. Contractor must be able to support online order submission and payment processing.

- What is the average subscription retention rate?

ANSWER: *The Journal of The First-Year Experience & Students in Transition* has an annual renewal rate of approximately 70%.

- How many new subscribers are there per year?

ANSWER: The Journal of The First-Year Experience & Students in Transition has enrolled approximately 200 new subscribers annually in the last three years.

- Can you provide a sample of a previous survey?

ANSWER: The NRC does not currently survey lapsed subscribers. We would seek to gain insight into why subscribers decided not to renew the subscription to improve our product and/or our subscriber retention efforts.

- How many claims are processed annually?

ANSWER: The NRC processes approximately 5-6 claims for missing or damaged issues of the *Journal* annually.

- How many customer service requests (email, phone, fax, and mail inquiries that do not result in an immediate order) for publications? Subscriptions?

ANSWER: The NRC does not currently track customer service calls. The number of calls received not resulting in an order is minimal.

- How many backstarts are processed annually?

ANSWER: The majority of backstart requests come from purchasing agents (e.g., EBSCO), but these are minimal. On very rare occasion, the NRC receives a request for all available back issues from a library that has purchased a new subscription.

QUESTION #20: Regarding eBooks:

- Will both publications and journals be converted? How many of each?
- Are electronic documents available for any of them?
 - a. If so, what percentage will have to be scanned from hardcopies?
 - b. What format are the electronic versions in?

- What is the average number of pages per title?
- What is the average number of images per title?
- What formats types would you like to be converted (MOBI – Amazon Kindle, ePub – iPad, Knook, Borders Kobo, and Sony Reader)?
- Is conversion to flipbook required?
- Please describe how you are managing electronic document and ebook delivery currently?

ANSWER: The NRC does not currently support ebook publication or delivery, with the exception that the content of the *Journal of The First-Year Experience & Students in Transition* is available for pdf download on MetaPress. Current subscribers have unlimited access to content; others can access content on a pay-per-view basis. Site access and sales are managed by MetaPress.

Ebook publication would most likely focus on book-length titles produced by the NRC. At this time, the NRC does not have plans to convert backlist titles to ebook; however, electronic versions of any backlist titles to be converted would be available in pdf format. The NRC would seek to convert new and selected backlist titles to ePub format on a limited basis initially in order to assess the cost-effectiveness of and interest in this delivery method. We do not require flipbook conversion.

Book-length publications from the NRC typically range from 150 – 200 pages each. Images are typically limited to data displays (i.e., tables and figures) rather than photos; the number of images varies based on the content of the publication with research-based books containing more images.

QUESTION #21: Is it possible to receive an extension on the RFP deadline?

ANSWER: If the University should decides to extend the Submit Offer By (Opening Date) for the solicitation because it believes by doing so is in the best interest of the University, it will include that information in an amendment to the solicitation. The University will not consider extending the the Submit Offer By (Opening Date) for the solicitation at this time.

QUESTION #22: Are the 5 titles that are sold in lots of 100 pre-boxed, shrinkwrapped, or banded in anyway in quantities of 100? How many are averaged per box of these titles.

ANSWER: For the most part, the current inventory of guides are not pre-boxed or banded in quantities of 100. Current inventory is boxed 200 guides to a carton. Beginning in August 2011, requests for reprints have stipulated that guides be shrinkwrapped in stacks of 25 and packed 200 guides (i.e., 8 stacks) per carton.

Dear Colleague,

My records indicate that you have not yet renewed your subscription to the *Journal of The First-Year Experience and Students in Transition*. We hope that this bi-annual journal has provided you the research base needed to support your efforts in improving the learning and success of college students in transition.

A renewal order form is attached for your convenience in extending your online access and assuring that you receive the next print edition that is expected to be released in November.

Please complete the order form and fax it to 803-777-4699. University Policies prohibit us from receiving order forms containing credit card information *via email*.

Thank you,

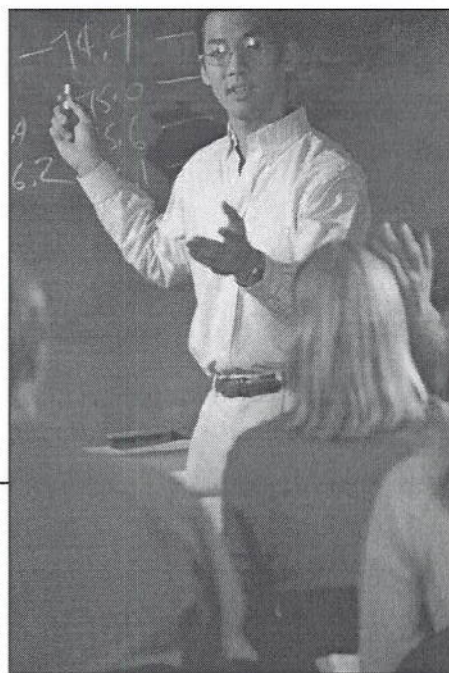
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- ♦ Cutting-edge research concerning the factors affecting the academic and social lives of students in transition



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	One-year	Multi-year	One-year	Multi-year
within continental U.S.	\$45	\$40 per year	\$110	\$105 per year
outside continental U.S.	\$55	\$50 per year	\$120	\$115 per year

PLEASE CALCULATE TOTAL: _____ Year(s) _____ x Price _____ = Total

CUSTOMER INFORMATION: Name _____

Position Title _____ Institution _____ Phone _____

MetaPress ID _____ E-mail _____ IP Address _____





SHIPPING ADDRESS: _____ (required) _____ (for institutional subscriptions)

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Check payable to the University of South Carolina Federal ID # 57-6001153

Purchase Order PO# _____

Credit Card    

Card # _____ - _____ - _____ - _____ Exp. Date _____

Cardholder Name _____ Signature _____

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