

## **REQUEST FOR PROPOSAL (RFP)**

Official Vendor/Wholesaler Sponsorship  
for the Ontario Library Association's  
Forest of Reading® Programs

Issued by Gap. Point. Reach. Inc.  
on behalf of the  
Ontario Library Association.

February 17, 2014

### **THE INTENT OF THE RFP**

The Ontario Library Association Board of Directors is inviting OLA Associate Member firms to submit a proposals that will be used as the basis to award 'Official Vendor/Wholesaler' sponsorship status for the OLA Forest of Reading® programs, including:

- The Blue Spruce Award™ Program
- The Silver Birch Award® Program, including SB Express
- The Red Maple Award™ Program
- The White Pine Award™ Program
- The Evergreen Award™ Program
- The Golden Oak Adult Reading Club™ Program
- Le Prix Tamarac™ (see Appendix D as well)
- Le Prix Peuplier™ (see Appendix D as well)

The intent of the OLA is to provide the institutional participants in the program with a most preferred single source for the purchase of all books/materials nominated for the OLA Forest of Reading® Programs for the program year 2015, 2016, and 2017. The RFP is in keeping with past partnerships and is expected to be a comprehensive multi-year partnership. It is not a service agreement only.

The OLA considers this to be a competitive process that will provide all potential bidders (limited to OLA Associate Members) with an open opportunity to present their case, and one that ensures that the ground rules are the same for all bidders and that no vendor has an unfair advantage. All submissions will be treated confidentially. The OLA is not required to accept the highest or any bid, nor is it able to guarantee either sales exclusivity or results. OLA also reserves the right to add, take-away or otherwise alter the programs, with notice, at any time. OLA reserves the right to break up parts of the RFP and offer individual pieces to willing responders. OLA reserves the right to negotiate final terms with one or more vendor. OLA will not reimburse costs of preparing the proposals.

The OLA is open to entertaining 'alternative' strategies for supporting these various programs, either individually or as a whole. The OLA is particularly interested in vendors

making suggestions, within their RFP, that will positively enhance the program status and corresponding participation and revenues. The OLA has added some Appendices to this RFP for consideration on potential stand-alone pieces that might be responded to.

## **ONTARIO LIBRARY ASSOCIATION**

Founded in 1900, the Ontario Library Association is a registered non-profit charitable organization and with almost 5,000 members is the largest of the provincial associations in Canada. OLA creates programs, advocacy and promotion for its members in college, school, university and public libraries.

The Ontario Library Association, through leadership and collaboration, is a centre of excellence for the library and information sector. OLA enables members, through their shared values, dynamic expertise and collective wisdom to:

- advocate the democratic right of all individuals in Ontario to have free and equitable access to information
- research and develop innovative programs and services to meet the challenges of change in the delivery and use of information
- deliver exemplary library and information services throughout Ontario

Whether in a formal setting, in a commercial setting or in government, OLA members are the people who bring information to the people of Ontario. They are librarians, teacher-librarians, technicians, information brokers, school administrators, publishers and producers, trustees, culture protectors, authors, friends of libraries, library suppliers, wholesalers, and other professionals.

Revenues for the Association are derived from membership fees, education activities, publication development and sales, donations and sponsorships, and related project administration. The OLA Forest of Reading® is one of the many programs that OLA offers.

## **THE FOREST® IS EIGHT EXCITING PROGRAMS, FOR READERS OF ALL AGES in TWO LANGUAGES.**

Why people love The Forest of Reading® and have since 1994;

- Over 250,000 children and young adults read every year in the Forest of Reading® across Ontario. It is the largest recreational reading program in the country.
- Reading for pleasure is fun. It's a private luxury and a great conversation piece to be shared with others. These programs are out to foster that great feeling with everyone – readers and non-readers alike!
- It shows the quality of our Canadian books and writers. If you are going to read, you want the best and The Forest of Reading® selects the titles that the readers want. Additionally, it is a great way to meet Canadian authors!
- The reading programs create millions of dollars of extra sales that Canadian authors and publishers would never see. It is a wonderful benefit that reading for enjoyment is helping the industry grow.
- There is not a committee of people selecting the winners; the young readers select

- themselves without influence by adults. By voting in one of The Forest of Reading® programs, readers tell library staff, librarians, authors, teacher-librarians, publishers and parents what they like. This leads to better books!
- Every reader contributes to the results and to Awards that matter to authors – the series of Festival of Trees® in the Spring will host as many as 15,000 kids from around the province to celebrate the nominees and winners. The satellite Festivals are now held around the province, and are one of the growing areas of engagement.
  - Libraries make this happen and they do it well!

Please visit: [www.accessola.com/forest](http://www.accessola.com/forest) <<http://www.accessola.com/forest>> for more information on the Forest and OLA.

### **BENEFITS OF BEING THE 'OFFICIAL VENDOR/WHOLESALER' FOR THE FOREST OF READING®**

When YOUR company is awarded the 'Official Vendor/Wholesaler' status for these programs, YOU will be able to:

- boost the awareness and name recognition of your firm through the thousands of exposures related to the marketing and execution of these programs
- be seen by Ontario's library leaders as essential partners and participants in these highly acclaimed reading programs
- gain on the competition through the OLA provision of:
  - advance notice of the book titles nominated.
  - ability to offer for sale, in advance of announcements, packages of materials/books based on inside knowledge.
  - 'first call' on publisher's inventory, because of advance notification of the list – your advance notice to get large orders in to publishers.
  - distribution of your order forms to program registrants and prospective registrants in the marketing phase of the program.
  - enhanced relations with publishers through increased sales and closer working relationships fostered by the Forest®.
- a direct push and encouragement to all buyers to purchase from your firm, the 'Official Vendor/Wholesaler' as thanks for your generous support
- receive special recognition at the OLA Super Conference, as an OLA corporate sponsor, on OLA's website, and in other print media of OLA.
- automatic integration and recognition as an OLA partner in other major events that OLA supports like Super Conference.
- see your sales, market share and customer list grow. This opportunity we expect is worth at least \$1,800,000 in annual sales.

### **VENDOR/WHOLESALER REQUIREMENTS AND RESPONSE GUIDELINES**

Responses to this RFP must be in writing and are based on phases. The RFP will be issued at 12:00 p.m. EST on February 17, 2014. It will be emailed to Associate members and posted prominently on the Association's website.

Phase I – written acknowledgement (in email format) that your firm intends to assemble a proposal for the Board to consider. Notice should be sent by March 7, 2014, at 12:00 p.m.

EST to:

Jefferson Gilbert,  
Principal, Gap. Point. Reach. Inc.  
[jgilbert@gappointreach.com](mailto:jgilbert@gappointreach.com)

GPR has been appointed OLA's official representative for advertising, sponsorship and exhibit sales.

Phase II – a period for questions. Questions can be posed to the Association. Answers will be posted and be available to the all firms who responded in Phase I. The question will be seen as Anonymous by the other responders. Questions need to be posed by March 21, 2014, at 12:00 p.m. EST. Answers will be provided no later than April 4, 2014, at 12:00 p.m. EST.

Questions can be sent to:

Jefferson Gilbert,  
Principal, Gap. Point. Reach. Inc.  
[jgilbert@gappointreach.com](mailto:jgilbert@gappointreach.com)

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Phase III – completed responses, and applicable attachments, to this RFP will be due no later than April 25, 2014, at 12:00 p.m. EST. Submitted to:

Ontario Library Association  
2 Toronto Street, 3<sup>rd</sup> Floor  
Toronto, ON M5C 2B6  
Attn: Jefferson Gilbert, Principal, Gap. Point. Reach. Inc.  
[jgilbert@gappointreach.com](mailto:jgilbert@gappointreach.com)

T: 416-699-1938

GPR has been appointed OLA's official representative for advertising, sponsorship and exhibit sales.

Phase IV – The Association may seek clarifications from submitted vendors during the April 25 – May 16, 2014 period.

Final Announcement – Target date is May 27, 2014.

## **EVALUATION PROCESS**

A committee of the OLA Executive/Board of Directors and Forest of Reading® members will evaluate the responses and make its decisions known to all respondents no later than the week of May 27, 2014.

The composition of the Evaluation Committee will depend on who submits bids, as there will be a very clear conflict-of-interest process undertaken on the decision-makers.

The successful respondent(s) will be expected to commence work immediately and transition with the incumbent, if necessary.

If awarded a contract, the company or companies will be expected to make initial payment to the OLA of the amount tendered for base sponsorship prior to the announcement of the

nominated 'Official Selections' in Autumn 2014 of the first year of the tender. An agreed upon schedule for subsequent payments will be negotiated at the time of the acceptance of the successful awarding of the contract.

A contract will be prepared and signed by both parties prior to announcements. The responses to the RFP will be the basis of that agreement.

## **REQUEST FOR PROPOSAL (RFP) OFFICIAL VENDOR/WHOLESALE PROVISION**

- 1.0 Company identification
  - Key contact names and Titles
  - Contact numbers/e-mails
  - OLA Associate Membership Number
  
- 2.0 Demonstrated ability to act as a single source
  - 2.1 Current Ontario school and public library customer base. Please provide as precise a figure as possible as a percentage.
  - 2.2 Sourcing from Canadian publishers and agents. Confirm at the time of submission if there are any publishers your firm currently does not have terms negotiated with. OLA reserves the right to make inquiries with key publishing partners.
  - 2.3 Customer service staff available to support programs - names and contact information. Please identify any specific experience that they have that might be beneficial for the Forest of Reading® work.
  - 2.4 Selection staff who can assist the Forest of Reading Selection Committees. Please identify any specific experience that they have that might be beneficial for the Forest of Reading® work.
  - 2.5 Administrative staff that would be assigned to this contract. Please identify any specific experience that they have that might be beneficial for the Forest of Reading® work.
  - 2.6 Management staff that would be assigned to this Contract. Please identify any specific experience that they have that might be beneficial for the Forest of Reading® work.
  - 2.7 Other staff that would be an asset to the program. Please identify any specific experience that they have that might be beneficial for the Forest of Reading® work.
  - 2.8 Ontario showrooms and displays for viewing and purchasing; provide sample schedule of Ontario events your firm attends (take-aways), and confirmation that you would include Forest® titles in these displays. Other methods you would propose to communicate, sell and ultimately build the program.
  - 2.9 Sales force who can bring awareness; provide a commitment to how they will be involved in the Forest®
  - 2.10 Cataloguing and processing service
  - 2.11 Timely delivery. Please provide what you would consider a 'Forest® Standard' for orders from Ontario buyers.
  - 2.12 Prior experience with OLA Forest of Reading® Programs or other. Please be as specific as possible. This can include people, companies, and other large-scale initiatives that might be considered parallel to the Forest®.
  - 2.13 Unique partnerships/alliances that might be of benefit to the OLA and the Forest®.
  - 2.14 Other interesting expertise that could be leveraged to build the Forest®.
  - 2.15 Please quantify, in dollar terms, the support you think will be necessary to support your response in 2.3-2.7, 2.9 and 2.12.

- 3.0 Proposed discount percentage (could be a range) and shipping charges to program customers
  - 3.1 What discount did you promote in print advertising to customers for the 2014 Forest of Reading®, if applicable.
  - 3.2 Public library discount range.
  - 3.3 School discount range.
  - 3.4 Shipping charges.
  - 3.5 Special discounts that would apply to program participants.
  - 3.6 Sample of any 2013-14 Forest® sales sheets, screen captures from website and/or other promotion materials.
  - 3.7 Any other pertinent information that relates to pricing and discounts on the Forest of Reading® program titles.

COMMENT: The OLA is interested in a multi-facet, shared success model of revenue sharing and sponsorship. To that end, there are a number of areas that the OLA is suggesting, but not limiting, methods in which to support the programs and the Association's work.

- 4.0 Dollar value tendered to the OLA for the Year 2015 program(s) for contract as 'Official Vendor/Wholesaler' for the following. Companies can choose individually or skip to 4.9 for the entire Forest®. Also see Appendices A – D.
  - 4.1 Blue Spruce Award™
  - 4.2 Silver Birch Award®
  - 4.3 Red Maple Award™
  - 4.4 White Pine Award™
  - 4.5 Evergreen Award™
  - 4.6 Golden Oak Award™
  - 4.7 Le Prix Tamarac™ (see also Appendix B)
  - 4.8 Le Prix Peuplier™ (see also Appendix B)
  - 4.9 An amount for ALL OF THE PROGRAMS as 'Official Wholesaler' for all OLA Forest of Reading® Programs
  - 4.10 Statement of interest and level of commitment for subsequent years 2016 and 2017. Please include any variations on the 2015 amount here.
- 5.0 An expression of interest, and proposed structure, for profit sharing at OLA operated or affiliated events. (Also see Appendix C and D)
  - 5.1 Operation of TheOLASTore at Super Conference
  - 5.2 Attendance at any official OLA launch programs and award events, including the Growing Festival of Trees® events throughout Ontario and potentially Canada. (Also see Appendix C)
  - 5.3 Attendance at Forest® specific events held by School Boards, etc.
- 6.0 There are existing structures and processes in place to support the programs. These have evolved over the last twenty years. However, the OLA is eager to learn how the respondent might approach some of the larger pieces that have proved complex in the past.

- 6.1 Selection Committee Support. How would you propose supporting the committees that support the Forest® and Festival®? Please specifically address some of the following:
- Solicitation, Collection and Distribution of eligible materials. Processes and costs are both factors.
  - Communication and interaction with Committee Members.
  - Confidentiality and Conflict of Interest.
- 6.2 Communication with Publishers, with respect to Selection, obligations, Program Awareness, and Festival participation.
- 6.3 Official Vendor/Wholesaler and OLA communication with schools and libraries. What works in 2014 and beyond? Historically, there has been a mass mailing with information, poster and order forms. Is that still the most effective way to reach this audience? Share your views on what you would do to get the message out, reinforced to capture book sales, and program registrations.

Please visit: [www.accessola.com/forest](http://www.accessola.com/forest)  
<[https://www.accessola.org/OLAWEB/Forest\\_of\\_Reading/Get\\_Involved/Selection\\_Committees/OLAWEB/Forest\\_of\\_Reading/Selection\\_Committees.aspx](https://www.accessola.org/OLAWEB/Forest_of_Reading/Get_Involved/Selection_Committees/OLAWEB/Forest_of_Reading/Selection_Committees.aspx)> for more information on the Selection Committee.

- 7.0 An expression of interest, and proposed profit share structure based on annual sales related to the Forest of Reading® sales. For the purposes of the RFP, please use the assumption of \$1,800,000 in annual sales by the Official Vendor/Wholesaler for all 8 programs. Please present as a percentage (For example, 3.15% of first \$1,000,000; 4.25% of all subsequent sales, etc.)
- 8.0 An expression of interest, and proposed structure and amounts, for soliciting financial support from publishing partners who are part of the annual lists, including but not limited to a marketing fee to OLA, support of authors, support of a poster, etc. Traditionally, publishers have contributed between \$100 and \$500 per nominated title based on the Program in which their title is nominated.
- 9.0 An expression of interest, and a proposed financial consideration to offset expenses related to the Annual Festivals of Trees® events held around Ontario.
- 10.0 Any other contributions (monetary or in-kind) to the OLA, either directly or arranged, through corporate partners and friends particularly around the support of the programs.
- 11.0 Please outline and identify cash and/or in-kind values of any and all additional augmentations that you feel would enhance your response and build awareness of the program. This could include: posters, other print materials, and web-presence.
- 12.0 Advertising commitments, in OLA publications and online, including The Open-Shelf, AccessOLA.com, The Teaching Librarian and Super Conference pre and on-site programs, that you would make as part of being the Official wholesaler.
- 13.0 Commitment and suggestions to add value and expand the base of the program leading to increased program success (web site, etc.). Also See Appendix A, B, C and

D)

- 14.0 One of the biggest challenges facing OLA is the fact that the registration fees for the program are minor in comparison to the related resource sales. Please identify any other methods of developing revenue streams that you would be able to assist with. One obvious expense that OLA has a need to cover is a Co-op Student and/or basic staffing.
- 15.0 Confirmation that as the Official Vendor/Wholesaler that you will be responsible for and share, with OLA, the following information:
- accurate contact information for authors and illustrators in Excel format
  - accurate contact information for publishers, publicists, etc. in Excel format

The OLA has been developing richer web resources to support The Forest® and will need support in encouraging the publishers to participate in providing materials for the reforestation initiative including publicity materials, content, etc.

Additionally, that you will be able to share:

- accurate title by title, and program by program, sales data on a confidential basis
- 16.0 Comments or additional considerations for the OLA Committee to consider. This is an opportunity to differentiate your vision for what the Forest® and component programs might be able to achieve.

## **APPENDICES**

The following Appendices are provided to suggest some smaller parts of the Forest® that might be bid on to help with particular areas. Any responses and ultimately any contracts will need to be streamlined and not competitive to the Official Vendor/Wholesaler and their role in Ontario.

### **APPENDIX A**

#### **Expanding the Forest® Beyond Ontario**

This element can be bid on as part of the larger initiative or separately if it is better suited to a firm with the infrastructure to expand and serve broader geographical areas. It will involve both program sales/promotion and book sales.

**GOAL:** The Forest® has many followers outside of Ontario and some provinces and territories without the resources to establish their own reading programs would like to adopt some or all of the Forest® programs. Do you have an expertise that would justify removing these non-Ontario areas from the Official Vendor/Wholesaler and/or working in partnership with the Official Vendor/Wholesaler?

- 1.0 Company identification  
Key contact names and titles  
Contact numbers/e-mails  
OLA Associate Membership Number
- 2.0 Please explain key ideas on how this would be achieved.
- 3.0 Project Revenue Sharing Model for OLA, please be very specific in terms of what would be fixed payments to OLA and which would be variable.
- 4.0 Who would the key personnel be with this area of development? Please provide as much detail on their expertise, experience, and suitability for this as possible.
- 5.0 Please provide proposed timelines and/or methods you would use that would not be competitive to an Ontario-focused Official Vendor/Wholesaler.

### **APPENDIX B**

#### **Supporting Le Prix de Tamarac and Le Prix Peuplier**

This element can be bid on as part of the larger initiative or separately if it is better suited to a firm with the infrastructure to expand and serve a specific language specific. It will involve both program sales/promotion and book sales.

**GOAL:** The Forest® has two French language lists that have been growing in importance and stature. Do you have an expertise that would justify removing these from the Official Vendor/Wholesaler and/or working in partnership with the Official Vendor/Wholesaler? OLA has a goal to grown and better support these programs.

- 1.0 Company identification  
Key contact names and titles

Contact numbers/e-mails  
OLA Associate Membership Number

- 2.0 Please explain key ideas on how this would be achieved.
- 3.0 Project Revenue Sharing Model for OLA, please be very specific in terms of what would be fixed payments to OLA and which would be variable.
- 4.0 Who would the key personnel be with this area of development? Please provide as much detail on their expertise, experience and suitability for this as possible.

#### APPENDIX C

##### **Building a Network of Forest of Reading® Festivals**

This element can be bid on as part of the larger initiative or separately if it is better suited to a firm with the infrastructure to expand and serve broader geographical areas. It will involve both program sales/promotion and book sales.

GOAL: Through grants and investment by OLA, the Forest of Reading® and the Festival of Trees® have spread out to all corners of Ontario where there are Spring events including Authors and Illustrators from the programs. The program has taken on an importance of its own, and it is clear there is a strong desire to continue to expand. Does your firm have an expertise that would benefit separating some of these geographical areas (for example: Far Northern Ontario for events in Thunder Bay, North Bay, and Sault Ste Marie) from the main RFP and/or something you would propose in partnership with the Official Vendor/Wholesaler and OLA?

- 1.0 Company identification  
Key contact names and titles  
Contact numbers/e-mails  
OLA Associate Membership Number
- 2.0 Please explain key ideas on how this would be achieved.
- 3.0 Project Revenue Sharing Model for OLA, please be very specific in terms of what would be fixed payments to OLA and which would be variable.
- 4.0 Who would the key personnel be with this area of development? Please provide as much detail on their expertise, experience and suitability for this as possible.
- 5.0 Please provide proposed timelines and/or methods you would use that would not be competitive to an Ontario focused Official Vendor/Wholesaler.

#### APPENDIX D

##### **Local Bookshops Supporting Festival Events Each Year**

This element can be bid on as part of the larger initiative or separately if it is better suited to a firm with the infrastructure to expand and serve specific geographical area. It will involve both event based book sales.

GOAL: The Forest® and related Festival of Trees® are going to places around the province. It may not be practical to always use the Official Wholesaler to sell books at the event. Is your firm better positioned to do this? Is there a way to work in partnership with the Official Wholesaler to achieve a win-win for the events and the various firms involved? OLA does not want to have higher returns than are absolutely necessary.

- 1.0 Company identification
  - Key contact names and titles
  - Contact numbers/e-mails
  - OLA Associate Membership Number
- 2.0 Please explain key ideas on how this would be achieved.
- 3.0 Project Revenue Sharing Model for OLA, please be very specific in terms of what would be fixed payments to OLA and which would be variable.
- 4.0 Who would the key personnel be with this area of development? Please provide as much detail on their expertise, experience and suitability for this as possible.
- 5.0 Please provide proposed timelines and/or methods you would use that would not be competitive to an Ontario focused Official Vendor/Wholesaler.

#### APPENDIX E

#### **Pertinent Statistics about the Forest of Reading® germane to submitted a response to the RFP.**

##### **Forest™ 2013 Program Registrations**

- More than 3,000 schools and public libraries individually registered.
- 96% were in Ontario
- 20% are run by non-Teacher Librarians in schools

##### **Sales/Units or Trends**

- Silver Birch Express has become increasingly popular.
- Blue Spruce, Silver Birch Fiction and Red Maple Fiction remain the most popular
- In 2014 the following number of titles were nominated for each Award:
  - Blue Spruce Award™ - 10 titles (Picture Books)
  - Silver Birch Award® - 30 titles (15 Fiction / 15 Non-Fiction)
  - Red Maple Award™ - 10 titles (10 Fiction)
  - White Pine Award™ - 20 titles (10 Fiction /10 Non-Fiction)
  - Evergreen Award™ - 10 titles (10 Fiction)
  - Golden Oak Award™ - 8 titles (6 Fiction / 2 Non-Fiction)
  - Le Prix Tamarac™ - 10 titles (16 Fiction / 4 Non-Fiction)
  - Le Prix Peuplier™ - 10 titles (Picture Books)
- Publishers involved in the 2014 program include:
  - Aladdin
  - Amazon Childrens Publishing
  - Annick Press
  - Annick Press
  - Arsenal Pulp Press

- Bayard
- Bayard
- Bloomsbury
- Boomerang
- Boomerang
- Candlewick Press
- Dancing Cat Books
- Dominique et compagnie
- Doubleday Canada
- Dundurn
- Édition Foulire
- Editions du Phoenix
- Fitzhenry & Whiteside
- FONFON
- General Store
- Goelette
- Great Plains Publications
- Greystone Books
- Greenwood Books
- Hachette Book Group Canada
- Harper Collins
- Heritage
- Heritage
- Hurtubise
- Inhabit Media
- Isatis
- James Lorimer & Company
- Kids Can Press
- L'Interligne
- Les éditions de la Bagnole
- Little Brown Books
- Lorimer
- Michel Quintin
- Nimbus Publishing
- Normand Renaud
- Orca Book Publishers
- Owlkids Books
- Pajama Press
- Penguin Canada
- Pierre Tisseyre
- Puffin Canada
- Random House Canada
- Red Deer Press
- Running Press
- Scholastic Canada
- Second Story Press
- Signet
- Simon & Schuster
- Soulières
- St. Martin's Press

- Trampoline
- Tundra
- Viking Canada

### **Festival Events**

In 2014 OLA, along with their partners, will host the following Festivals:

- North Bay/Parry Sound (2,000 readers)
- Thunder Bay (1,000)
- London (1,500)
- Toronto (10,000 including French and English)
- Ottawa (1,000)