1. Quote Summary

<table>
<thead>
<tr>
<th>Solution</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Year 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>OCLC WorldShare Management Services Annual Subscription*</td>
<td>$54,662</td>
<td>$54,662</td>
<td>$57,395</td>
<td>$60,265</td>
</tr>
<tr>
<td>OCLC Cataloging Flat-rate Credit</td>
<td>($1,059)</td>
<td>($1,059)</td>
<td>($1,059)</td>
<td>($1,059)</td>
</tr>
<tr>
<td>OCLC ILL Flat-rate Credit</td>
<td>($815)</td>
<td>($815)</td>
<td>($815)</td>
<td>($815)</td>
</tr>
<tr>
<td>OCLC WorldShare Management Services Implementation (One-time Fee)</td>
<td>$29,655</td>
<td>$29,655</td>
<td>$29,655</td>
<td>$29,655</td>
</tr>
<tr>
<td>On-site Workflow Consulting (One-time Fee)</td>
<td>$6,300</td>
<td>$6,300</td>
<td>$6,300</td>
<td>$6,300</td>
</tr>
<tr>
<td><strong>OCLC WorldShare Management Services Total</strong></td>
<td>$88,743</td>
<td>$52,788</td>
<td>$55,521</td>
<td>$58,391</td>
</tr>
</tbody>
</table>

Optional Services**

| OCLC Report Designer                                           | $4,752  | $4,752  | $4,990  | $5,239  |
| OCLC License Manager                                           | $4,074  | $4,074  | $4,278  | $4,492  |
| License Manager Set-Up Fee (One-time Fee)                      | $1,105  | $1,105  | $1,105  | $1,105  |
| **Total with Optional Services**                               | $98,674 | $61,614 | $64,789 | $68,122 |

*The pricing package offered as part of OCLC WorldShare Management Services ("WMS") Annual Subscription includes unlimited:
- Cataloging through OCLC Cataloging service
- Interlibrary loans through OCLC WorldShare ILL
- OCLC Access
- Print and Electronic Acquisitions with serials control
- Circulation and Delivery
- OCLC WorldCat Discovery which includes web exposure of the library’s holdings
- OCLC WorldCat Discovery Options next generation discovery interface, including remote database searching, course reserves, and item location and availability (local and group)

**Optional OCLC Services Available at Additional Cost:
- Report Designer
- WorldShare License Manager

2. Terms and Conditions

A. OCLC's fiscal year is July 1st - June 30th. Year 1 begins on the date your library goes into production on WMS (the “Go-Live Date”, which you target in conjunction with your implementation team and based on availability at Agreement signing) and ends on the following June 30th. The Year 1 subscription fee is the amount shown above and will be prorated based on the actual Go-Live Date. The Implementation fee is invoiced 50% upon OCLC’s receipt of fully executed copies of this Proposal and associated terms and conditions ("Agreement"), and the remaining 50% upon the Go-Live Date. The On-site Workflow Consulting fee will be invoiced upon completion of the work. The default invoice frequency for subscription fees is monthly. Any pre-existing subscriptions your library has for OCLC products and services that are included in the list above will continue to be invoiced at their current frequency until the Go-Live Date and your library is billed for WMS.

B. The WMS implementation fee is based on your library’s decision to implement as part of a cohort of libraries (as opposed to individually). The fee includes implementation, configuration, training, and data migration services. Please see and initial Proposal Attachment A, which contains additional details on your data migration.
C. Once signed, this Proposal, which includes Attachment A, becomes binding and a part of the overall Agreement (i.e., the WorldShare Management Services Terms and Conditions and terms and conditions for other OCLC Services covered under this Proposal). Should there be any conflict between this Proposal and other terms and conditions of the Agreement, this Proposal shall control.

By signing and returning to OCLC, DeSales University accepts this Proposal (check optional services):

<table>
<thead>
<tr>
<th>Optional Services</th>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>OCLC Report Designer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>OCLC License Manager</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Debbie Malone  
Library Director  
DeSales University  
2755 Station Avenue  
Center Valley, PA 18034

Date
Proposal Attachment A: Data Migration

Thank you for providing OCLC with information related to your existing ILS data. Based on that information, the following data migration assumptions were made in preparation of this proposal:

- Library will deliver bibliographic records in MARC 21 format. MARC data will need to adhere to OCLC Bibliographic Formats and Standards. For more information on MARC 21 format, please visit: http://www.loc.gov/marc/bibliographic/ecbdhome.html and for more information on OCLC Bibliographic Formats and Standards, please visit: http://www.oclc.org/bibformats/en/about/.

- The Library’s translation table contains 1 location(s).

- Item types are used.

- The Library’s serials collection is not bar-coded.

- OCLC will create/load Local Holdings Records (LHRs) for 140,000 physical items via one or multiple batchload projects appropriate when migrating from Innovative Interfaces Millennium system.
  - Electronic Holdings will be managed by the library in the Knowledge Base.

- OCLC will migrate patron data from a file delivered by the Library in either tab-delimited or XML format.

- OCLC will migrate circulation transactional data (to be delivered by the Library in tab-delimited format).

- Acquisitions data will not be migrated.

Should changes occur to your data migration information above or should additional requirements be requested during the implementation process, OCLC reserves the right to reassess the implementation pricing and additional charges may occur.

Initials  Date
Your WorldShare Management Services Implementation

The OCLC® WorldShare™ Management Services (WMS) implementation team is available to ensure the success of your investment by assisting you with data migration, policy configuration, staff training and change management.

With the cohort option, you will be part of a small group implementing WMS together, with a shared curriculum and on an established schedule. The cohort model enables you to learn both from fellow cohort institutions and OCLC experts. OCLC’s dedicated, experienced staff will guide you step-by-step through your WorldShare Management Services implementation.

Upon receipt of your order, an OCLC implementation team member will contact you to get the process underway. This meeting will be used to define implementation goals, critical success factors and timeframe.

Choosing the best configuration. We will familiarize you and your staff with WMS and the Service Configuration module, which enables you to configure the service to your library’s specifications. As you make choices about configuration, we will be available to assist and advise you. We will also help you begin to evaluate how WMS will work in relation to your library’s policies and workflows.

Migrating your data. Data migration can be one of the most daunting aspects of a migration. You will receive assistance assessing your data and then OCLC data experts will facilitate the migration of data from your current ILS to WMS, employing tools and knowledge developed from our experience migrating the data of early adopters.

On-site Workflow Consulting. With a change of systems comes a change of workflows. OCLC team members will share with you workflow best practices and advise you on how best to change your existing workflows to maximize the efficiencies made possible by WMS.

Change Management. Change is hard. OCLC team members will provide you with tools to help ensure effective communication to your stakeholders.

Training. Live online training on WMS is available at no additional charge to you and your staff members as long as you have WMS. You can attend as often as you like and send new staff members through training as part of their onboarding process. Also, you will have access to self-paced tutorials and documentation for on-demand information needs.

Testing, marketing and success. OCLC will assist as you validate that your configuration is correct and ensure WMS is performing as expected. We will provide communication materials to help you roll out changes to your staff and user community. We will also provide materials to help you conduct post-implementation interviews, which will assist in determining additional needs or adjustments needed to the configuration and/or workflows—all to help your library reach success.

OCLC and community support extends beyond the migration period. The WorldShare User Support Center provides a focal point for news, documentation and discussion. Member-led community meetings ensure ongoing contact to share questions, experiences and suggestions.
Hi Deb,

I hope all is well with you! I was sent the pricing proposal for DeSales University to move to WorldShare Management Services. You have the option at the bottom of the proposal to add on the Analytics, License Manager, and a Consulting Service that we can offer during implementation to review work-flow change management.

A few things to keep in mind when reviewing your pricing:

1) The implementation fee for DeSales University is $29,655.00. You can pay half when you sign ($14,828.00) and the second half is due on your go live date.

2) DeSales University is currently spending $22,089.00 for your core services from OCLC (Cataloging, Access, ILL and WorldCat Discovery Services). This amount is already factored into your WMS annual subscription so your net new would be roughly $30,700.00.

3) This price also includes the five add on components for WorldCat Discovery Services. The cost for the five add on components would cost roughly $18,000.00 a year if purchased alone. The implementation for WorldShare Management Services takes 6-8 months so please keep that in mind when you are making your decision.

The pricing is valid for 60 days but we can just ask for an update at any time. I have attached a cost comparison document that explains everything that is included in your subscription to WMS. We can go over the pricing proposal after our presentation in April. I will go ahead and request Terms and Conditions so we have everything we need if you decide to move forward.

Let me know if you have any questions!

Kind regards,

Tony

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Tony Skoczylas
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