



Greg Kiryakakis, Regional Manager
May 8, 2008





| | | |
|------------------------------------|-----------------------------------|--------------------------------|
| College of Alameda Bookstore | Carrie Brightman Store Manager | |
| Laney College Bookstore | Anya Pekarczyk Store Manager | Andy Penner Text Manager |
| Merritt College Bookstore | Neville Hennings Store Manager | Joanna Sanchez Text Manager |
| Berkeley City College Bookstore | April Day Store Manager | |

Agenda Topics

- Follett Higher Education Group Values
- Text Cycle/Adoption Process
- Used Textbooks
- efollett.com Features for Faculty
- Discussion and Q & A



Follett Higher Education Group

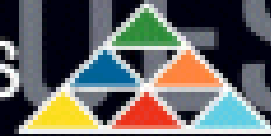
Follett is the leading contractor of bookstore services and the foremost suppliers of used books in North America

- History:** Follett is 130 years old and started in 1873. Follett ranks 12th on *Crains Chicago Business* of largest privately held companies in Illinois. Follett ranks 116th on *Forbes* list of 500 top privately held companies.
- Mission:** To help all college bookstores become world class, multi-channel academic retailers and to support higher education by being the preeminent provider of academic and collegiate products and services.
- Market:** Follett currently operates more than 720 bookstores across the United States and Canada serving more than 4 million students and 300,000 faculty.
- Employees:** More than 8,000 regular full and part-time employees whose mission is to help Follett become the Employer and Retailer of Choice by putting People First.
- Products:** New and used textbooks, an extensive selection of trade and reference books, campus apparel, gifts, software and related campus merchandise.





Follett VALUES



- We value CUSTOMERS
- We value INNOVATION
- We value INTEGRITY
- We value TEAMWORK
- We value ACCOUNTABILITY
- We value EACH AND EVERY ASSOCIATE



The Bookstore's Partnership With Your Academic Community is Critical

Especially:

- When books are adopted
- How books are discussed and used in class
 - this is key to students' perception of value
- Your recommendations

Comments welcome anytime!



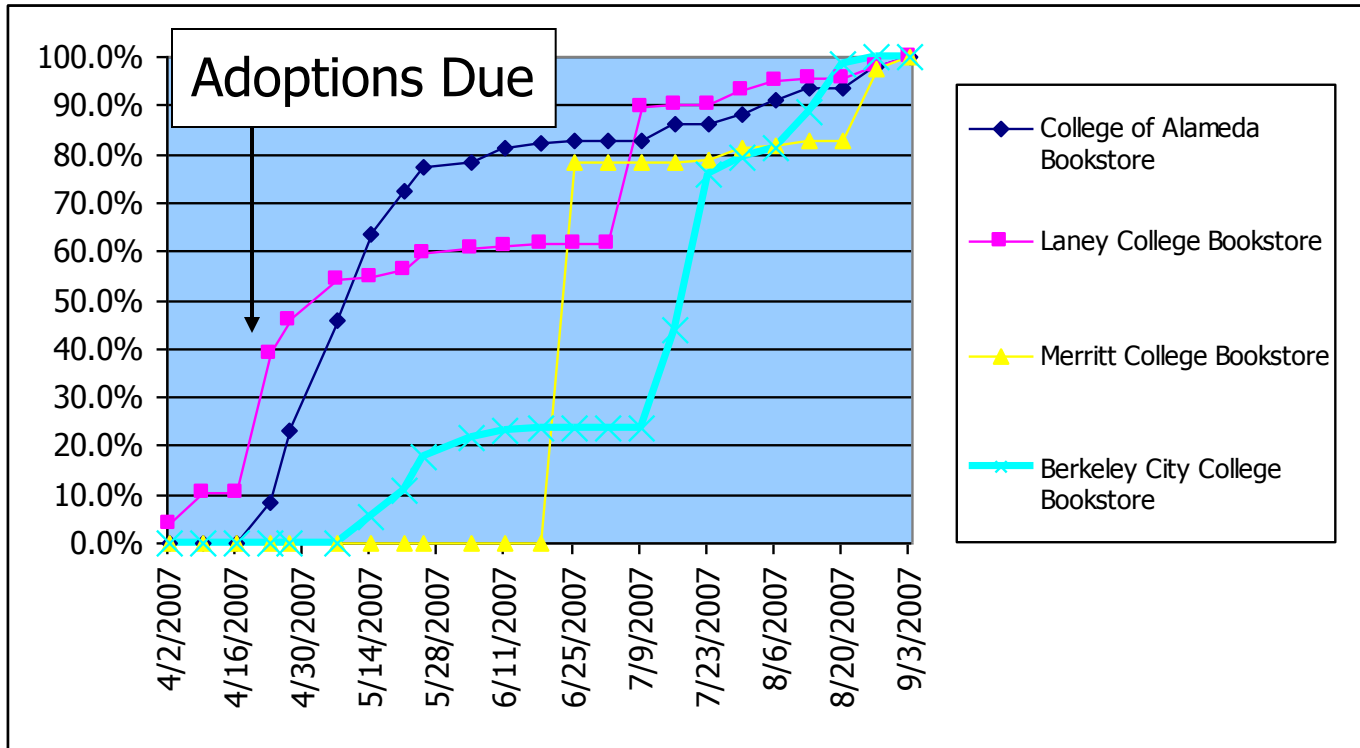
Fall 2007 Term Adoption Cycle

| | Courses Expected | Titles Expected |
|---------------------------------|---------------------|--------------------|
| Berkeley City College Bookstore | 336 | 341 |
| Merritt College Bookstore | 613 | 395 |
| College of Alameda Bookstore | 563 | 314 |
| Laney College Bookstore | 1129 | 646 |

- Adoptions Due 04/16/07
- Research/Adoption Entry As Received
- End of Term Book Buy 05/21/07
- Sales Floor Set Up to Begin 06/27/07
- Purchase Orders to Publishers 06/13/07
- Fall Classes Begin 08/22/07
- Ending Inventory 10/13/07
- Returns Begin 10/15/07



Fall 2007 Adoption Receipt Trend Line



Adoptions Before Buyback Enhances Our Ability To Provide Used Book Selection



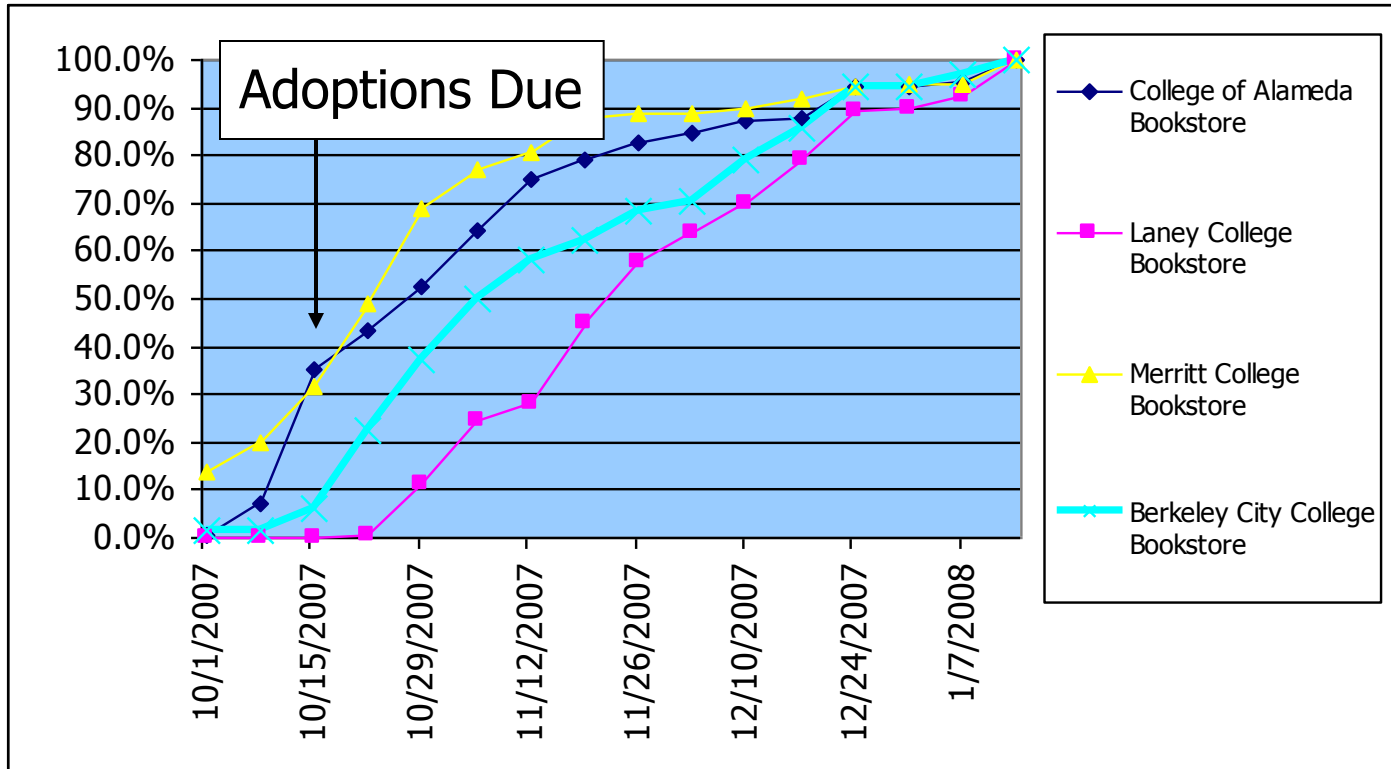
Spring 07-08 Term Adoption Cycle

| | Courses Expected | Titles Expected |
|---------------------------------|---------------------|--------------------|
| Berkeley City College Bookstore | 396 | 407 |
| Merritt College Bookstore | 712 | 406 |
| College of Alameda Bookstore | 549 | 347 |
| Laney College Bookstore | 1245 | 697 |

- Adoptions Due 10/15/07
- Research/Adoption Entry As Received
- End of Term Book Buy 12/17/07
- Sales Floor Set Up to Begin 11/05/07
- Purchase Orders to Publishers 11/15/07
- Spring Classes Begin 01/17/08
- Ending Inventory 03/01/08
- Returns Begin 03/20/08



Spring 07-08 Adoption Receipt Trend Line



Adoptions Before Buyback Enhances Our Ability To Provide Used Book Selection



Course Materials Issues

Changed Adoptions / Late Adoptions

- Purchases and Sales
- Errors>Returns
- Used Books
- Substituted Titles / Bundles

Store Under-Buying

- Issues in Class
- Customer Service
- Lost Sales
- Costly Re-orders

Over-Buying

- Costs (restocking fees or returns limited)
- Vendor Relations



Used Books Save

Average Retail Price

| | | |
|----------|---------|-----------------------------------|
| New | \$72.83 | |
| Used | \$54.62 | |
| Buyback | \$27.31 | (Bought as used and sold back) |
| Net Cost | \$27.31 | |
| Savings | \$45.52 | (New price less buyback received) |



Used Book Drivers

- Adoptions By Due Date
- Adoptions Received Before End of Term Buyback Period
- Store Wholesale Search Activities and Time Allowed
- Adoption of "Packages" or "Bundles"



Students Saved: College of Alameda

| | FY08 YTD* | FY07 | FY06 |
|----------------------|-----------|-----------|-----------|
| Used Sales | \$351,775 | \$341,103 | \$344,358 |
| New Sales | 504,210 | 423,916 | 432,094 |
| Used Text Ratio | 41.1% | 44.6% | 44.4% |
| Buyback Dollars Paid | 78,633 | 75,291 | 73,071 |

| Savings to Students | | | |
|----------------------------|------------------|------------------|------------------|
| Used vs. New | 117,258 | 113,701 | 114,786 |
| Buyback Dollars Paid | 78,633 | 75,291 | 73,071 |
| Total | \$195,891 | \$188,992 | \$187,857 |

(*Fiscal Year End: March 31)



Students Saved: Laney College

| | FY08 YTD* | FY07 | FY06 |
|----------------------|-----------|-----------|-----------|
| Used Sales | \$637,823 | \$821,417 | \$647,524 |
| New Sales | 1,154,314 | 1,201,138 | 1,032,660 |
| Used Text Ratio | 35.6% | 40.6% | 38.5% |
| Buyback Dollars Paid | 137,159 | 160,836 | 138,856 |

| Savings to Students | | | |
|----------------------------|------------------|------------------|------------------|
| Used vs. New | 212,608 | 273,806 | 215,841 |
| Buyback Dollars Paid | 137,159 | 160,836 | 138,856 |
| Total | \$349,767 | \$434,642 | \$354,697 |

(*Fiscal Year End: March 31)



Students Saved: Merritt College

| | FY08 YTD* | FY07 | FY06 |
|----------------------|-----------|-----------|-----------|
| Used Sales | \$467,051 | \$386,379 | \$277,119 |
| New Sales | 579,059 | 758,944 | 820,073 |
| Used Text Ratio | 44.7% | 33.7% | 25.0% |
| Buyback Dollars Paid | 99,876 | 100,548 | 90,267 |

| Savings to Students | | | |
|----------------------------|------------------|------------------|------------------|
| Used vs. New | 155,684 | 128,793 | 92,373 |
| Buyback Dollars Paid | 99,876 | 100,548 | 90,267 |
| Total | \$255,560 | \$229,341 | \$182,640 |

(*Fiscal Year End: March 31)



Students Saved: Berkeley City College

| | FY08 YTD* |
|-------------------------------------|-----------------|
| Used Sales | \$190,890 |
| New Sales | 486,224 |
| Used Text Ratio | 28.2% |
| Buyback Dollars Paid | 32,330 |
| Savings to Students | |
| Used vs. New | 63,630 |
| Buyback Dollars Paid | 32,330 |
| Total | \$95,960 |
| <i>(*Fiscal Year End: March 31)</i> | |



Students Saved: Peralta District

| FY08 YTD | Alameda | Laney | Merritt | Berkeley City | Total |
|----------------------|----------------|--------------|----------------|----------------------|--------------|
| Used Sales | \$351,775 | 637,823 | 467,051 | 277,119 | 1,733,768 |
| New Sales | 504,210 | 1,154,314 | 579,059 | 820,073 | 3,057,656 |
| Used Text Ratio | 41.1% | 35.6% | 44.7% | 25.0% | 36.0% |
| Buyback Dollars Paid | 78,633 | 137,159 | 99,876 | 90,267 | 405,935 |

| Savings to Students | | | | | |
|----------------------------|------------------|------------------|------------------|------------------|------------------|
| Used vs. New | 117,258 | 212,608 | 155,684 | 92,373 | 577,923 |
| Buyback Dollars Paid | 78,633 | 137,159 | 99,876 | 90,267 | 405,935 |
| Total | \$195,891 | \$349,767 | \$255,560 | \$182,640 | \$983,858 |

(Fiscal Year End: March 31)



Bookstore Value: On Campus and Online

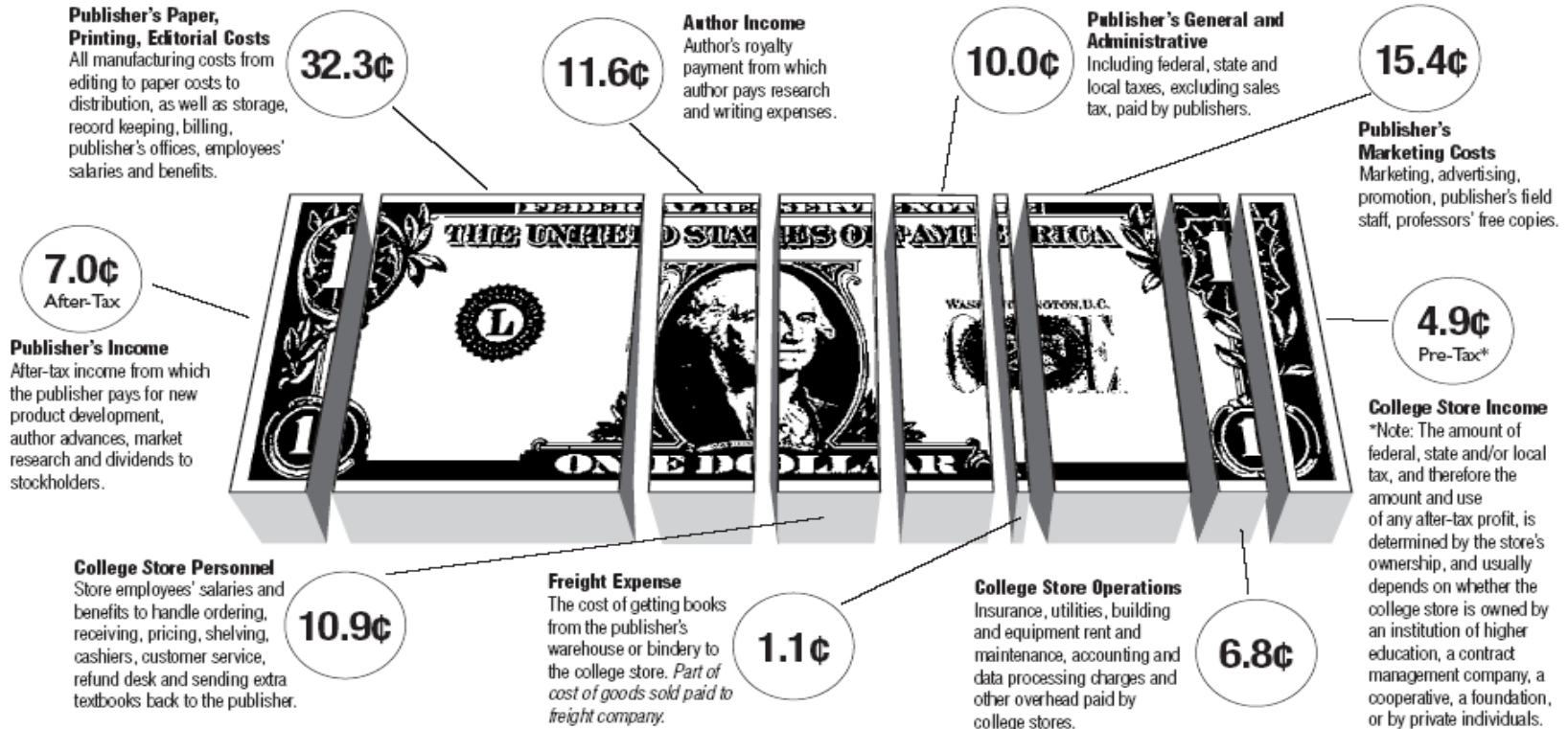
Our Store Others?

| | | |
|---------------------------------|-----|-----------|
| • Used Texts Available | Yes | Limited |
| • One source - all requirements | Yes | No |
| • Pick-up or Shipping Options | Yes | No |
| • Assurance of Right Materials* | Yes | No |
| • Immediate Availability | Yes | No |
| • Easy and Immediate Refunds | Yes | No |
| • Financial Aid Transactions | Yes | No |
| • Cash, check, credit card | Yes | No |
| • Immediate buyback | Yes | No |
| • Employs People On Campus | Yes | No |
| • Supports Campus Financially | Yes | No |

* Including passcodes if needed for access to research or reference sites



Where the New **Textbook Dollar** Goes* ...



*College store numbers are averages and reflect the most current 2003-2004 data gathered by the National Association of College Stores. Publisher numbers are estimates based on data provided by the Association of American Publishers.



Sales to Actual Enrollment Observations

| | Number of Titles | Faculty Enrollment Estimate | Actual Enrollment | Actual to Estimated Enrollment | Total Units Available | Units Sold | Sold to Units Available | Sold to Actual Enrollment |
|---------------------|------------------|-----------------------------|-------------------|--------------------------------|-----------------------|------------|-------------------------|---------------------------|
| Fall 2007 | | | | | | | | |
| Merritt | 365 | 14,876 | 15,042 | 101% | 9,856 | 7,118 | 72% | 47% |
| Laney | 779 | 32,641 | | 15146% | 21,503 | 15,146 | 70% | |
| Alameda | 297 | 16,215 | 13,612 | 84% | 7,305 | 6,164 | 84% | 45% |
| Berkeley City | 426 | 15,882 | | | 10,552 | 5,997 | 57% | |
| Fall 2006 | | | | | | | | |
| Merritt | 433 | 13,131 | | | 11,459 | 8,705 | 76% | |
| Laney | 705 | 24,108 | 21,439 | 89% | 24,235 | 19,330 | 80% | 90% |
| Alameda | 346 | 11,962 | | | 8,508 | 5,799 | 68% | |
| Spring 07-08 | | | | | | | | |
| Merritt | 358 | 14,984 | 12,768 | 85% | 8,310 | 7,075 | 85% | 55% |
| Laney | 620 | 40,305 | 26,511 | 66% | 32,929 | 13,837 | 42% | 52% |
| Alameda | 334 | 16,965 | 12,568 | 74% | 7,119 | 5,866 | 82% | 47% |
| Berkeley City | 378 | 18,888 | 15,726 | 83% | 11,986 | 6,007 | 50% | 38% |
| Spring 06-07 | | | | | | | | |
| Merritt | 357 | 14,113 | 13,561 | 96% | 9958 | 7,431 | 75% | 55% |
| Laney | 890 | 42,589 | 43,610 | 102% | 29212 | 22,140 | 76% | 51% |
| Alameda | 336 | 17,214 | 12,161 | 71% | 9,660 | 5,804 | 60% | 48% |

Sell-Through is Strongly Influenced by Faculty



Sales to Actual Enrollment Observations

| Term | Campus | Number of Titles | Faculty Enrollment Estimate | Actual Enrollment | Actual to Estimated Enrollment | Total Units Available | Units Sold | Sold to Units Available | Sold to Actual Enrollment |
|--------------|---------------|------------------|-----------------------------|-------------------|--------------------------------|-----------------------|------------|-------------------------|---------------------------|
| Spring 07-08 | Merritt | 358 | 14,984 | 12,768 | 85% | 8,310 | 7,075 | 85% | 55% |
| Fall 2007 | Merritt | 365 | 14,876 | 15,042 | 101% | 9,856 | 7,118 | 72% | 47% |
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| Fall 2006 | Alameda | 346 | 11,962 | | | 8,508 | 5,799 | 68% | |
| Spring 07-08 | Berkeley City | 378 | 18,888 | 15,726 | 83% | 11,986 | 6,007 | 50% | 38% |
| Fall 2007 | Berkeley City | 426 | 15,882 | | | 10,552 | 5,997 | 57% | |

Sell-Through is Strongly Influenced by Faculty



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