<div align="center">**SOMERSET COUNTY LIBRARY COMMISSION**
NOTICE OF RFP FOR INTEGRATED LIBRARY SYSTEM</div>

The SOMERSET COUNTY LIBRARY COMMISSION is soliciting proposals through a competitive contracting process in accordance with N.J.S.A. 40A:11-4.1, et seq.

Sealed RFP responses will be received by Brian Morgan, Finance Director, on Thursday, March 16, 2017 at 3:30 P.M. in the Technical Training Center of the Somerset County/Bridgewater Library, 1 Vogt Drive, Bridgewater, NJ 08807 at which time and place responses will be opened for:

Integrated Library System (ILS)

Specifications and instructions may be obtained at the

> Somerset County/Bridgewater Library
> 1 Vogt Drive
> Bridgewater, NJ 08807

or on the SOMERSET COUNTY LIBRARY SYSTEM website at http://www.sclsnj.org/*

* Any RFP Addenda will be issued on the website. Therefore, all interested Respondents should check the website from now through RFP opening. It is the sole responsibility of the Respondent to be knowledgeable of all addenda related to this procurement.

Bidders are required to comply with the requirements of N.J.S.A. 10: 5-31 et seq. and N.J.A.C. 17:27-1 et seq.

Brian Morgan, Finance Director
February 20, 2017

1. INTRODUCTION

The SOMERSET COUNTY LIBRARY COMMISSION is seeking qualified service provider(s) to provide and support an Integrated Library System (ILS) that will meet the Library's enterprise requirements for functionality, scalability, reliability, and manageability. This contract is to provide an ILS system and services for migration through a competitive contracting process in accordance with N.J.S.A. 40A:11-4.1, et seq.

2. ADMINISTRATIVE CONDITIONS AND REQUIREMENTS

The following items express the administrative conditions and requirements of this RFP. Together with the other RFP sections, they will apply to the RFP process, the subsequent contract, and the provision of services. Any proposed change, modification, or exception to these conditions and requirements may be the basis for the SOMERSET COUNTY LIBRARY COMMISSION, hereinafter referred to as SCLC, to determine the proposal non-responsive to the RFP, and will be a factor in the determination of an award of contract. The contents of the proposal of the successful Respondent , as accepted by the SCLC, will become part of any contract awarded as a result of this RFP.

2.1. Schedule

The dates established for the procurement are:
- Release of RFP   Monday, February 20, 2017
- Questions due   Thursday, March 2, 2017
- Addendum posted   Thursday, March 9, 2017
- Proposal Due Date   Thursday, March 16, 2017
- On-site demos   April 20, 21, 24, 2017
- Governing Body Action   Wednesday, May 3, 2017

2.2. Proposal Submission Information

Submission Date and Time:

Thursday, March 16, 2017 at 3:30 P.M.
One (1) Original & One (1) copy.

Submission Office:

Brian Morgan, Finance Director
Somerset County Library
1 Vogt Drive
P.O. Box 6700

Bridgewater, NJ 08807

Clearly mark the submittal package with the title of this RFP and the name of the responding firm, addressed to the Somerset County Library Finance Director. The original proposal shall be marked to distinguish it from the one (1) copy. Only those RFP responses received prior to or on the submission date will be considered. Responses delivered before the submission date and time specified above may be withdrawn upon written application of the Respondent who shall be required to produce evidence showing that the individual is or represents the principal or principals involved in the proposal. After the submission date and time specified above, responses must remain firm for a period of ninety (90) days.

2.3.   Users of these Services

The users of services are the SOMERSET COUNTY LIBRARY COMMISSION and the Somerset County Library System of New Jersey (SCLSNJ) administration and staff.

2.4.   SCLC Representatives for this Solicitation

Please direct all questions regarding the RFP process in writing to:

Brian Morgan
Fax: (908) 707-8324
Email: bmorgan@sclibnj.org

2.5.   Interpretations and Addenda

Respondents are expected to examine the RFP with care and observe all its requirements. Please direct all questions regarding the scope of services and technical specifications in writing to Lynn Hoffman (lhoffman@sclibnj.org) by Thursday, March 2, 2017 at 5:00 p.m. EST. Answers to all questions will be issued by an Addendum posted to the website on the Exempt Services RFP notice button by Thursday, March 9, 2017 at 5:00 p.m. EST. Only comments and questions responded to by formal written Addenda will be binding. Oral interpretations, statements or clarifications are without legal effect.

2.6.   Estimates of Quantities

Wherever the estimated quantities of work to be done are shown in any section of this RFP, including the Pricing form (section 6.2, page 40), they are given for use in comparing proposals. The SCLC especially reserves the right (except as

herein otherwise specifically limited) to increase or diminish the quantities as may be deemed reasonably necessary or desirable by the SCLC to complete the work detailed by the contract. Such increase or diminution shall in no way violate this contract, nor shall any such increase or diminution give cause for claims or liability for damages.

2.7. Cost Liability and Additional Costs

The SCLC assumes no responsibility or liability for costs incurred by the Respondent prior to the issuance of an agreement. The liability of the SCLC shall be limited to the terms and conditions of the contract.

Respondents will assume responsibility for all costs not stated in their proposals. All unit rates either stated in the proposal or used as a basis for its pricing are required to be all-inclusive. Additional charges, unless incurred for additional work performed by request of the SCLC, are not to be billed and will not be paid. No extra work or charges under this contract will be recognized or paid unless agreed to in writing by the SCLC or SCLSNJ staff before the work is done or the change is made.

2.8. Statutory and Other Requirements

2.8.1. Compliance with Laws

Any contract entered into between the contractor and the SCLC must be in accordance with, and subject to, compliance by both parties with the New Jersey Local Public Contracts Law. The contractor must agree to comply with the non-discrimination provisions of that law and all other laws and regulations applicable to the performance of services there under. The Respondent shall sign and acknowledge such forms and certificates as may be required by this section.

2.8.2. Mandatory Affirmative Action Compliance

No firm may be issued a contract unless it complies with the Affirmative Action regulations of P. L. 1975, C. 127 as identified in the documents attached hereto. The form shall be properly executed in order for SCLC to determine compliance.

2.8.3. Americans with Disabilities Act of 1990

Discrimination on the basis of disability in contracting for the delivery of services is prohibited. Respondent s are required to read the American

with Disabilities language that is part of the documents attached hereto and agree that the provisions of Title II of the Act are made part of the contract. The contractor is obligated to comply with the Act and hold the SCLC harmless.

2.8.4. Stockholder Disclosure

No corporation or partnership shall be awarded any contract for the performance of any work or the furnishing of any goods, unless, with receipt of the proposal of said corporation or partnership, there is submitted a statement setting forth the names and addresses of all stockholders in the corporation or partnership who own ten (10) percent or greater interest therein. The Respondent shall complete and submit the certification form that is included in this RFP.

2.8.5. Non-Collusion Affidavit

The Non-Collusion Affidavit, which is part of this RFP, shall be properly executed and submitted with the RFP response.

2.8.6. N.J. Business Registration Certificate

Certificate required pursuant to C57, PL2004; failure to be registered by time of contract award may be cause for rejection. Entities or individuals that need to file for a certificate may do so on-line through the NJ Division of Local Government Services at the following link:

http://www.state.nj.us/treasury/revenue/busregcert.shtml

2.8.7. Disclosure of Investment Activities in Iran

P.L. 2012, c.25 prohibits State and local public contracts with persons or entities engaging in certain investment activities in energy or finance sectors of Iran.

2.8.8. Insurance and Indemnification

If it becomes necessary for the contractor, either as principal or by agent or employee, to enter upon the premises or property of the SCLC in order to construct, erect, inspect, make delivery or remove property hereunder, the contractor hereby covenants and agrees to take, use, provide and make all proper, necessary and sufficient precautions, safeguards, and protection against the occurrence of happenings of any accident, injuries,

damages, or hurt to person or property during the course of the work herein covered and his/her sole responsibility.

The contractor further covenants and agrees to indemnify and save harmless the SCLC from the payment of all sums of money or any other consideration(s) by reason of any, or all, such accidents, injuries, damages, or hurt that may happen or occur upon or about such work and all fines, penalties and loss incurred for or by reason of the violation of any SCLC regulation, ordinance or the laws of the State, or the United States while said work is in progress.

The contractor shall maintain sufficient insurance to protect against all claims under Workers Compensation, General Liability and Automobile and shall be subject to approval for adequacy of protection and shall provide such certificates of insurance when requested.

2.9. Submission of Multiple Proposals

Multiple proposals from an individual, firm, partnership, corporation or association under the same or different names may be considered, provided each proposal stands alone, and independently complies with the instructions, conditions and specifications of the RFP.

2.10. Partial Award

The Library reserves the right to award contracts for all or part of the services. In addition, the Library reserves the right to reject all proposals.

2.11. Failure to Enter Contract

Should the Respondent to whom the contract is awarded fail to enter into a contract within ten (10) days, Sundays and holidays excepted, the SCLC may then, at its option, accept the proposal of another Respondent .

2.12. Commencement of Work

The contractor agrees to commence work after the date of award by the SCLC and upon notice from the using department.

2.13. Termination of Contract

If, through any cause, the contractor shall fail to fulfill in a timely and proper manner its obligations under the Contract, or if the contractor violates any

requirements of the Contract, the SCLC shall thereupon have the right to terminate the Contract by giving written notice to the contractor of such termination at least thirty (30) days prior to the proposed effective date of the termination. Such termination shall relieve the SCLC of any obligation for the balances to the contractor of any sum or sums set forth in the Contract.

In case of default by the contractor, the SCLC may procure the articles or services from other sources and hold the contractor responsible for any excess cost occasioned thereby.

2.14. Challenge of Specifications

Any Respondent who wishes to challenge a specification shall file such challenge in writing with the Somerset County Library System of New Jersey Finance Director no less than three (3) business days prior to the opening of the RFP's. Challenges filed after that time shall be considered void and will have no impact on the SCLC or the award of contract.

2.15. Payment

The SCLC issues checks once a month on the first Wednesday of each month, excepting holidays. A voucher with the vendor's original signature must be attached to all invoices and be in the ordering department's possession roughly two weeks prior to the first Wednesday of the following month in order for a check to be ready on that date.

The SCLC will not pay interest or late fees.

2.16. Ownership of Material

The SCLC shall retain all of its rights and interest in any and all documents and property, both hardcopy and digital, furnished by the SCLC to the contractor for the purpose of assisting the contractor in the performance of this contract. All such items shall be returned immediately to the SCLC at the expiration or termination of the contract or completion of any related services, pursuant thereto, whichever comes first. None of the documents and/or property shall, without the written consent of the SCLC, be disclosed to others or used by the contractor or permitted by the contractor to be used by their parties at any time except in the performance of the resulting contract.

Ownership of all data, materials and documentation originated and prepared for the SCLC pursuant to this contract shall belong exclusively to the SCLC. All data, reports, computerized information, programs and materials related to this project

shall be delivered to and become the property of the SCLC upon completion of the project. The contractor shall not have the right to use, sell, or disclose the total of the interim or final work products, or make available to third parties, without the prior written consent of the SCLC. All information supplied to the SCLC may be required to be supplied on storage media compatible with standard operating systems and file formats.

3.   SCOPE OF WORK/TECHNICAL SPECIFICATIONS

SCLC is soliciting proposals for a new Integrated Library System (ILS) solution fully furnished to meet the specifications detailed in this RFP.

3.1.   Background

The Somerset County Library System of New Jersey (SCLSNJ) serves the 187,000 residents of 15 member communities in Somerset County, as well as the people who work and go to school there. Residents live predominantly in small and medium-sized boroughs and townships throughout the County, accounting for approximately 60% of the total County population.

SCLSNJ's ten branch libraries are well used. In 2016, 2.9 million items were checked out and 1.5 million people visited branches to borrow materials, participate in educational programs, use public computers, enjoy cultural events, or read, study and interact in a clean, safe and pleasant place. SCLSNJ has a collection of approximately one million items and employs approximately 130 full-time and 165 part-time staff members. In 2016, SCLSNJ was recognized as one of only six Library Journal Star Libraries in New Jersey, and has been consistently honored as such over the last 4 years.

In 2003, SCLSNJ migrated from Dynix to Innovative Interfaces, Inc. (III)'s Millennium ILS, and is currently running Millennium on an in-house production server. There is a single standard set of circulation policies that cover all ten branches, which includes fines, fees, check-out periods, borrowing privileges and user profiles. All circulation and user-record policy files are managed by system-level staff. Cardholders may borrow items from any SCLSNJ branch and return items to any SCLSNJ branch. Patron-generated requests are filled from a common system pool and shared among all libraries. Materials on hold and in transit are transferred among libraries via a delivery service operated by the Library. All electronic resources and downloadable materials are equally available to cardholders.

The entire SCLSNJ system shares the same bibliographic records. System Technical Services and Automation staff members are responsible for setting the

cataloging standard, adding or editing bibliographic records, and maintaining the integrity of the database. Catalogers use the SkyRiver bibliographic record service to download bibliographic records and edit to local standards. Currently, individual library staff members are able to add items to previously generated bibliographic records, or to add on-the-fly records at checkout. The Library has contracted with Marcive for ongoing authority control services.

SCLSNJ uses both the Millennium acquisitions and serials modules. Technical Services staff use the EDI standard to send orders and receive invoices electronically from materials vendors (including Baker & Taylor, Ingram and Midwest Tape). Brief MARC records downloaded from vendor websites are embedded with order details and local holdings information in the 9XX field. The Library contracts with WT Cox Information Services for print serials management, and as part of the migration process, we plan to centralize check-in of most print magazine issues. SCLSNJ also uses the Millennium interlibrary loan module to manage requests.

The Innovative WebOPAC is the primary public catalog interface. SCLSNJ uses EBSCO EDS and is reviewing our implementation as part of a website redesign project in progress. Patrons also make increasing use of the SCLSNJ mobile app, provided by Capira, both for searching and for account management. The Library also partners with Unique Management for cardholder collection services.

SCLSNJ technology staff provides support for all aspects of system technology including the network infrastructure, hardware and software. Our ten branches are connected via ethernet virtual private line (EVPL) circuits across all ten locations. Administrative services are housed at the Bridgewater Library, which serves as the home of technology staff and as the network hub, and the nine other branches are connected via ethernet virtual circuits. WAN connectivity is provided through Verizon via contract with JerseyConnect and the NJ State Library, and is funded as part of the system-wide Automation budget. Bandwidth and all network devices were upgraded in 2016.

SCLSNJ supports approximately 475 individual workstations, approximately 275 of which are staff workstations representing a wide range of different hardware and operating systems, including Windows-based PCs, Chrome devices and iMacs. In 2015, SCLSNJ migrated to Google for Work to provide enterprise-wide email and productivity tools, with the intent to move away from Microsoft Windows and Office licensing and update costs. Approximately 35% of staff workstations are currently browser-based Chrome devices.

3.2.   Scope of Work

The scope of this project is to provide a fully functional integrated library system (ILS) solution for SCLC which meets the overall objectives and requirements as defined in this RFP, and to provide data migration, implementation, training, hosting and maintenance services. SCLC is interested only in hosted or SaaS solutions – SCLC will not consider premise-based solutions that require library staff to maintain local servers.

Responses should address all the specific questions included in the Proposed ILS Data form (section 6.1, page 19).

3.2.1. Project Objectives

SCLSNJ staff have identified four broad priorities for a new ILS product.

Web-based staff modules
SCLSNJ has been in the process of moving away from PC-based staff workstations for the last two years, and currently approximately 35% of the Library's 275 staff workstations are Chrome devices, meaning they are completely browser-based and will not support local software clients. In addition, staff provide a wide range of outreach services that would be greatly enhanced by live access to circulation functions. Having access to a solid web-based circulation module at the time of migration will be of great importance.

Robust reporting, analytics and data-retention
SCLSNJ needs system-level tools for reporting, as well as performing analytical functions. Allowance for long-term retention of circulation and other transaction data is critical to our ability to evaluate collection performance over a 3-5 year time frame. In addition, while a full-featured basic- to intermediate-level reporting module is important, SQL or other advanced access to the full database – including the full database schema – is critical.

A roadmap for use of RDA, FRBR, Bibframe, etc. to improve patron experience
Of course linked data provides a greater level of discoverability on the web at-large, of which SCLSNJ patrons will likely take full advantage. In addition, we would like to see the roadmap for development of other RDA-enabled features. One example might be cross-format holds, which allow a patron to indicate that they want to read the text of a high-demand book but don't care which format they get (regular type, large print, ebook, etc.), whichever is available first.

<u>Flexibility for developing creative, patron-focused products and solutions</u>
SCLSNJ staff have a successful history of working with our existing technology tools to create new products and solutions that solve problems for our patrons. A completely open-source approach is not required for us to continue this work, but we will require a demonstrated commitment to open standards and to seamless read- and write-access to ILS data.

In addition, other functionality is described in more detail as part of the Proposed ILS Data form (section 6.1, page 19).

3.2.2. Implementation

3.2.2.1. Planning

As part of the Proposed ILS Data form, provide a detailed implementation plan (section 6.1(J), question 1, page 36). In particular, please address the following:
- Time frame from date of award of contract to a hypothetical first day of system operations and acceptance
- Vendor's responsibilities and key dates
- SCLSNJ staff responsibilities and key dates
- Procedures for ongoing project review
- Pre-operations testing
- Response-time testing
- Acceptance of the system

3.2.2.2. Data Migration

As part of the Proposed ILS Data form, address any known issues with extracting and loading data from a Millennium system (section 6.1(J), question 5, page 37). In particular, please indicate any work that SCLSNJ staff would be required to perform to prepare data for migration:
- Patron information
- Patrons' saved lists
- Profile information for Outreach patrons
- Bibliographic information
- Serial volume records and/or data
- Summary holdings and check-in history information for serial record
- Item information
- Holds information
- Transaction information

- Acquisitions fund and vendor records
- Active order records

3.2.2.3. Training

As part of the Proposed ILS Data form, provide a detailed training plan (section 6.1(J), question 2, page 36). Please account for the following levels of training:
- Technical Training for key personnel in technical aspects of the system, including troubleshooting, first-level maintenance, and daily operation of the system
- Applications Training for SCLSNJ staff members, including both direct training and train-the-trainer model approaches

3.2.2.4. Testing

SCLC requires that the successful Respondent's system and each of its subsystems successfully pass the following acceptance tests:
- A Data Load Test will demonstrate and verify that library's data files have been properly loaded. This test will be performed to confirm that all patron records, bibliographic records, item records, acquisitions and serials records, and transaction files have been successfully loaded into the system. This test will be performed after all records have been loaded onto the system. This test may overlap other tests.
- Module Functionality Tests will to verify the required functional capabilities of each module of software that has been delivered.
- Response-Time Acceptance Tests will verify that the system is performing at the warranted performance levels. SCLSNJ staff will conduct or waive the Response-Time Acceptance Test as an acceptance test, after the acceptance tests described above have been successfully completed. Should the system demonstrate acceptable levels of performance through daily operations, the Library may choose to waive the acceptance test. Waiving the test at such time will not waive Library's right to conduct such tests in the future and require full warranty performance by the Proposer in the event of test failure.
- The System Reliability Test will demonstrate and verify that the system operates at a 99% reliability level for an

extended period of time.

4.   PROPOSAL REQUIREMENTS

4.1.   Proposal Forms

In order for a proposal to be considered complete, the following must be submitted with the proposal:
1. Form of Proposal
2. Proposed ILS Data
3. Pricing
4. Qualifications
5. References
6. Affirmative Action Mandatory Language
7. Affirmative Action Statement
8. Non-Collusion Affidavit
9. Stockholder Disclosure
10. Americans with Disabilities Act Mandatory Language
11. Disclosure of Investment Activities in Iran
12. Acknowledgement of Receipt of Addenda (if applicable)

4.2.   Proposed ILS Data

The successful Respondent shall review and fill out the Proposed ILS Data form (section 6.1, page 19) as completely as possible. Neither the SCLC nor Library staff are responsible for evaluating features or aspects of system design that are not addressed specifically by the Respondent in the Proposed ILS Data form.

4.3.   Qualifications

The Respondent shall provide a statement briefly describing the company, its industry, its ownership and history, its experience with the services proposed, and the identity, credentials and area of responsibility of those the Library could expect to work with, should the Respondent be awarded the contract for the proposed service (section 6.3, page 43).

4.4.   References

The Respondent shall provide a list of three (3) customers for whom the Respondent has performed similar web development work and where the site has been up and running for at least six months but no longer than two years. At least one (1) reference shall be for a public library or other non-profit entity with

similar needs regarding integration with third party tools and services. Contact, company name, address, and telephone number should be included (section 6.4, page 43).

5. EVALUATION, REVIEW AND SELECTION PROCESS

5.1. Proposals to Remain Subject to Acceptance

RFP responses shall remain open for a period of ninety (90) calendar days from the stated submittal date. The SCLC will either award the Contract within the applicable time period or reject all proposals.

The SCLC may extend the decision to award or reject all proposals beyond the ninety (90) calendar days and the proposals of any Respondents who consent thereto may, at the request of the SCLC, be held for consideration for such longer period as may be agreed upon.

5.2. Rejection of Proposals

The SCLC reserves the right to reject any or all proposals, or to reject any proposals if the evidence submitted by, or investigation of such evidence fails to satisfy the SCLC that such Respondent is properly qualified to carry out the obligations of the RFP and to complete the work contemplated therein. The SCLC reserves the right to waive any minor informality in the RFP.

5.3. Evaluation Process

An evaluation team shall review all proposals. The team will determine if the proposals satisfy the Proposal Requirements, determine if a proposal should be rejected and then evaluate the proposals based upon the Evaluation Criteria. A short list of Respondents will be further evaluated.

During the second phase, selected Respondents may be asked to meet on-site and provide demonstrations, most likely to be scheduled April 20, 21 and 24, 2017. Demonstrations will be open to all interested SCLSNJ staff members, who will have the opportunity to provide feedback to the evaluation team. SCLC may also submit written questions and requests for clarification or further information as needed. SCLC will require written answers to such questions and requests.

After the second phase, the highest-evaluated Respondent will then be recommended to the governing body for award of contract, based upon the Evaluation Criteria.

5.4. Evaluation Criteria

Listed below are the criteria that the SCLC will consider in the evaluation of each proposal. The arrangement of the criteria does not imply order of importance in the selection process. All criteria will be used to select the successful Respondent.

5.4.1. Understanding of the Requested Work

Proposals will be evaluated for general compliance with instructions and requests issued in the RFP. Non-compliance with significant instructions shall be grounds for disqualification of proposals.

5.4.2. Overall Suitability of the Proposed Solution

The ILS solution proposed by the Respondent will be evaluated for its overall suitability for SCLSNJ's current and future needs, based on the functions and features outlined in the Proposed ILS Data form (section 6.1, page 19).

5.4.3. Ability to Support Project Objectives

Proposals will be evaluated to determine the ability of the Respondent to support the key project objectives identified by SCLSNJ staff (section 6.1(A), page 20).

5.4.4. Implementation and Migration Plan

The migration and implementation plan proposed by the Respondent will be evaluated to determine the projected ease of the migration and the Respondent's approach to project management and communication (section 6.1(J), page 36).

5.4.5. Experience

Proposals will be evaluated to determine the Respondent's experience, including review of provided references that adequately demonstrate experience with the services proposed, and qualifications of key personnel who would be involved with the project (section 6.3 and 6.4, page 42).

5.4.6. Cost

Cost is an important consideration, especially over a five- or ten-year time horizon, but it is not an exclusive consideration. The evaluation process is designed to identify not necessarily the Respondent of least cost, but the Respondent with the best combination of attributes based upon all of the evaluation criteria.

5.5. Notice of Award

The successful Respondent will be notified of the award of contract upon a favorable decision by the governing body. The SCLC Finance Director may then send a Purchase Order/Voucher to the contractor.

5.6. Payment

Payment will be made on presentation of SCLC's voucher duly signed and executed and in accordance with the payment timetable established by the SCLC.

The following checklist is provided as assistance to the development of the RFP Response. It in no way supersedes or replaces the requirements of the RFP.

Please initial on the lines below for each document/section attesting to the fact that you have read and/or included the documents with your RFP.

Administrative Conditions and Requirements (p. 2-8)   _____

Scope of Work/Technical Specifications (p. 8-12)   _____

Evaluation Process (p. 14)   _____

Evaluation Criteria (p. 14-16)   _____

Form of Proposal (p. 17-43)   _____

Affirmative Action Mandatory Language (p. 44-45)   _____

Affirmative Action Statement (p. 46)   _____

Non-Collusion Affidavit (p. 47)   _____

Stockholder Disclosure (p. 48)   _____

Americans with Disabilities Act Mandatory Language (p. 49)   _____

Business Registration Certificate (p. 50)   _____

Disclosure of Investment Activities in Iran (p. 51)   _____

Acknowledgement of Receipt of Addenda (p. 52)   _____

6. FORM OF PROPOSAL

TO THE SOMERSET COUNTY LIBRARY COMMISSION:

The undersigned declares that he/she has read the Notice, Instructions, Affidavits and Scope of Services attached, that he/she has determined the conditions affecting the proposal and agrees, if this proposal is accepted, to furnish and deliver services per the attached schedule of fees for the following:

Company Name   _____

Federal I.D. or Social Security #   _____

Address   _____

                                              _____

Signature of Authorized Agent   _____

Type or Print Name   _____

Title: _____

Date   _____

Telephone Number   _____

Fax Number   _____

E-mail address   _____

6.1   Proposed ILS Data

Please review and fill out the Proposed ILS Data form as completely as possible. Neither the SCLC nor Library staff are responsible for evaluating features or aspects of system design that are not addressed specifically by the Respondent in this form.

For each question:
- Provide focused, clear, concise answers
- Describe how your system is unique
- Clarify what exists now and what is in development
- If in development, provide estimated release date or development timeline
- Provide answers that demonstrate an understanding of SCLSNJ preferences

Please use the following general information about SCLSNJ when you determine hardware configuration and system pricing. The figures below reflect either the most recent statistics we have available, or estimates for planning data migration.

Number of library locations	10
Annual checkouts and renewals	2,916,550
Number of bibliographic records	441,476
Number of item records	881,786
Number of order records (current year) - estimate for migration	113,630 126,000
Number of serial control records	920
Number of active patron records	97,441
Number of library staff users/workstations	160
Average number of daily OPAC searches	10,000

- A. General Questions
- B. Acquisitions
- C. Cataloging and Authorities
- D. Circulation
- E. OPAC/Discovery
- F. Other Modules
- G. Reports and Analytics
- H. IT and System Administration
- I. Third-Party Integration
- J. Implementation, Migration and Support

K. Vendor Stability and Experience

A.   General Questions

1. SCLSNJ has identified four major priorities for this project. Please describe how your system can help us meet each of these priorities:

   a. Web-based staff modules: SCLSNJ has been in the process of moving away from PC-based staff workstations for the last two years, and currently approximately 35% of the Library's 275 staff workstations are Chrome devices, meaning they are completely browser-based and will not support local software clients. In addition, staff provide a wide range of outreach services that would be greatly enhanced by live access to circulation functions. For each of the interfaces below, please describe what is currently available or provide a timeframe for the development of these capabilities.
      i.   Mobile and web-based Circulation
      ii.   Mobile Public Interface. Include information about the type of mobile interface available (i.e. Android app, web interface, etc.)
      iii.   Web-based Cataloging
      iv.   Web-based Acquisitions
      v.   Web-based Inventory Management
      vi.   Web-based System Administration

   b. Robust reporting, analytics and data-retention: SCLSNJ needs system-level tools for reporting, as well as performing analytical functions. Allowance for long-term retention of circulation and other transaction data is critical to our ability to evaluate collection performance over a 3-5 year time frame. In addition, while a full-featured basic- to intermediate-level reporting module is important, SQL or other advanced access to the full database – including the full database schema – is critical.

   c. A roadmap for use of RDA, FRBR, Bibframe, etc. to improve patron experience: Of course linked data provides a greater level of discoverability on the web at-large, of which SCLSNJ patrons will likely take full advantage. In addition, we would like to see the roadmap for development of other RDA-enabled features. One example might be cross-format holds, which allow a patron to indicate that they want to read the text of a high-demand book but don't care which format they get (regular type, large print, ebook, etc.), whichever is available first.

   d. Flexibility for developing creative, patron-focused products and solutions: SCLSNJ staff have a successful history of working with our existing technology tools to create new products and solutions that solve problems for our patrons. A completely open-source approach is not required for us to continue this work, but

we will require a demonstrated commitment to open standards and to seamless read- and write-access to ILS data.

2. SCLSNJ has been using its current ILS for nearly 14 years, and our data structure and policies have not been comprehensively reviewed since that time. Describe how your team can assist us in organizing our data, policies, and system-related procedures in a way that makes the best use of the standard functionality of your ILS, as designed. Include a description of the optimal method for data evaluation, preparation, migration and loading when the source data does not conform closely with integral design and features of the new system.

3. What mechanisms and functionality are built into your system for handling ADA requirements for both staff and customers?

4. What ergonomic design has been built into your system to help prevent repetitive stress injuries among library staff? For instance, does your system minimize mouse clicks for common or repetitive tasks? Are double-clicks required for completing any tasks in the staff interfaces?

5. Are workstation-specific or user-specific behaviors/properties in the client easily accessible by the operator for customization by the user? Are these properties retained by login or by workstation, or both? How is that distinction made?

6. Describe the approach your system takes for indicating the permanent, current or temporary location of an item. What fields are involved?

7. Please indicate whether or not your system supports each of the ILS features, functions or integrations listed below.

Required	Module/Product	Supported	Comments/Limitations
X	OPAC/Discovery module		
X	Circulation module (client-based)		
X	Circulation module (web-based)		
X	Acquisitions module		
X	Cataloging module		
X	Serials module		
X	Reporting/Analytics module		
	Interlibrary Loan module		
	Electronic Resource Management module		
	Booking module		

	Inventory module		
	Outreach module		
	Bibframe		
X	EDI ordering		
X	Offline circulation		
X	Telephone notification (native or integration)		
X	Email notification		
	Text notification		
X	Enhanced records content Syndetics LibraryThing NoveList Select		
X	Z39.50 client/server		
X	e-Commerce for patron accounts		
X	Unique Management - account collection		
X	Patron API or SIP2 connection for account authentication: Overdrive Communico (event calendar) Capira (mobile app)		
	Overdrive - e-content discovery/OPAC account integration		

B.   Acquisitions

1. Describe the process for setting up EDI for one vendor.

2. List all of the vendors with which your system can communicate via EDI and include the type of actions available for each (e.g. order, order confirmation, claiming, cancellation and invoicing).

3. Describe how call numbers are handled during EDI processing.

4. Describe how your system handles batch orders. What functionalities are in place to facilitate ordering of multiple copies per title? How does EDI facilitate batch ordering?

5. Can your system schedule and send a report via email of items ordered but not received within a time period specified by the library (e.g. 7 months from date of order)?

6. Does your system include a patron request workflow that feeds directly into your Acquisitions module? Is duplicate data entry required to move an item requested by a patron from the request into Acquisitions?

7. To what degree can the ratios on which high-holds reports are based be adjusted? For instance, can the ratio include on-order items so that high-hold titles that have already been addressed through orders no longer appear on the list? Can the ratio exclude non-holdable items or item types that might skew the appearance of a specific title (e.g. exclude non-holdable "Lucky Day" copies when calculating the ratio of holds to holdable copies)?

8. What processes come out-of-the-box to assist with automatic batch processing of items upon receipt? For example, when receiving materials, can you automatically have the items change from "on order" to "in processing"? Is there a quick data-entry form option for receiving items against multiple titles/orders, or do they have to be accessed by selecting a specific title/order for each?

9. How does your acquisitions module avoid creating duplicate on-order records for already hand-keyed on-order records, as well as fully cataloged bibliographic records already in the catalog?

10. Describe the fund structure for your ILS system. What reports are available that allow a library to analyze annual expenditures by fund?

11. How can you create a report of how much is spent by item type (or your system's equivalent for designating the circulating collection rule)?

12. Please include any other information about acquisitions you would like to share.

C.   **Cataloging and Authorities**

1. Are updates and additions made in the cataloging module immediately available in the public interface(s)?

2. How many bibliographic records can a staff member view simultaneously in the cataloging module? Will this change with a move to a web version of your staff interface?

3. Within the cataloging module, can bibliographic records be sorted by date?

4. Within the cataloging module, can you move from one bibliographic record to another via index or authority links? For instance, can you click on an author or series entry to go directly to a list?

5. Does your system provide a labeled display for fixed field editing? Please include a screenshot.

6. What matching criteria can be used when using Z39.50 to import records?

7. Does your system provide the capability to load a single bibliographic record? Multiple? Describe the options available.

8. When loading bibliographic records into the database, can fields be added, deleted, and edited during record load? Please describe the process.

9. Does your system provide reports for:
   a. Identifying items that are received and/or in process with holds
   b. Identifying items with typos in the Call Number
   c. Identifying items that are received and sort by received date

10. Does your system support the ability to move the following from one bibliographic record to another?
    a. An item record
    b. A patron hold
    c. An order record
    If so, please describe the process.

11. Does your system support the ability to merge two bibliographic records? If so, please describe the process and how the item records and existing holds are handled.

12. Are there item templates for efficient item creation in your system? Describe how to create multiple item/copy records for the same title at once.

13. Does your system support the ability to cut and paste blocks of text, including MARC tags, subfields, etc.?

14. Please provide the step-by-step process for printing spine labels, both in batch and one-by-one.

15. Describe the process for delete or purging bibliographic and item records, both individually and in batch. What are stopping conditions? What deletion dependencies are there? Does your system provide an intermediate discard or withdrawal step for use by front-line staff to prevent direct record deletion?

16. Does your system provide one-click access to the RDA toolkit when viewing or editing a specific field?

17. Does your staff cataloging module include a call number browse feature? If so, indicate how this browse would be accessed during the cataloging process.

18. Does your system support custom macros or text strings for use in cataloging? Please provide some examples of macros or text strings that have been set up in your system.

19. Describe how cataloging with diacritics is performed in your system. How do you catalog foreign languages on a regular basis (e.g. with alternative keyboards or via other means)?

20. Does your system support the ability to toggle to and from the public catalog while editing a record in staff mode, or provide a preview of the OPAC display?

21. How does the public interface utilize the data in fields, such as 336-338, 340-347, and 380-386?

22. Does your cataloging module provide pure spell-checking in the traditional sense, as well as a kind-of validation utility that spots things like extra spaces in call number fields or fields that start with an erroneous space?

23. RDA has an increased focus on record-to-record relationships based on FRBR and adopted the Work-Expression-Manifestation-Item structure. Does your system currently take advantage of this new data and structure to improve the user experience in any way? How? What future user experience improvements based on this data are planned? Please share a timeline.

24. Outline the services that your company can provide for authorities processing.
    a. Can ongoing authorities processing be done or is this only available on a one-time basis? If ongoing, can it be done on a schedule determined by SCLSNJ (monthly or quarterly)?
    b. Do your authority services utilize records from the Library of Congress?
    c. Can the updated authority records be loaded into our system by your staff or does staff at SCLSNJ have to do that step?
    d. How does your system identify bibliographic records that need authority records on an ongoing basis? Is a back file of which bibliographic and authority records are in the system established or is there another process done that shows which bibliographic records in the system have headings that still need authority records?

  e. When authority records are changed or new authority records are added to the system, how are affected headings updated? Are they changed overnight? Does it take a number of days for the updating and indexing to be completed?

  f. Is there any cataloging downtime (or moratorium) while headings in bibliographic records are being checked and updated?

  g. How long is the typical turnaround time for this type of authorities update service?

25. How does your system handle orphan authority records?

26. Can Lexile and Accelerated Reader data be added to bibliographic records on an ongoing schedule?

27. For 6xx data, can fields be stripped during record load? Can they be authorized by thesauri and indicator?

28. Do you provide other options to update or clean up the MARC data in bibliographic records, besides updated headings?
  a. Can new RDA 33X fields be added?
  b. Can new RDA 34X fields be added?
  c. Can filing indicators, GMD brackets; ISBNs; LCCNs and other data be corrected or normalized?
  d. Can other problems encountered in the bibliographic records be corrected?
  e. If so, is this service done on an ongoing basis or is this done on a one-time basis?
  f. Does such a bibliographic record update service include the entire database? Can smaller groups of newly added bibliographic records be sent later to receive the same type of services?
  g. Is there any cataloging downtime (or moratorium) while the work is being done?
  h. How long is the typical turnaround time for this type of bibliographic update service? In hours or days?
  i. If there must be some cataloging downtime, can this type of service be done over the weekend or overnight so it reduces cataloging downtime?

29. Does your system have any special features for cataloging proprietary materials, such as local history or other special collections?

30. Please include any other information about cataloging and authorities you would like to share.

D. Circulation

1. In what ways can pop-up windows or dialog boxes be controlled during the circulation process? What options are available per user or per workstation around the behavior of pop-up messages, including clearing them? Does the barcode scanner "return" affect the dialog box?

2. Can your system cap overdue fees at the cost of the item? A percentage of the item cost?

3. When checking in items, how can your system check an item in with today's date yet clear any fine that may be due? For example, we want to show that an item was handled and checked in today, but may want to waive all fines because we were unexpectedly closed yesterday.

4. When a patron brings an item to the desk to be checked out, but it has not been checked in from the previous patron, what are the behavior options? Is it possible to check the item in, clear any fine from previous patron, and check the item out to current patron, all in one step?

5. Does your system provide a feature for crediting patron accounts? Can credits be set so that they are used to automatically offset future fines or fees?

6. How are automatic renewals set up in your system? Can individual patrons opt in? Can they opt out?

7. Is it possible to place copy holds on multiple copies of a title simultaneously? If so, is this only available to staff or also to patrons? (This is particular of need with book clubs and with grade-level book lists, which have a high turnover rate.)

8. Does your system support the ability to move title level holds from one bibliographic record to another and integrate based on date the holds were placed? Does it support the ability to move item level holds from one item to another?

9. Describe the holds management process. Is this a report-based function? What options are available for dynamically formatting and sorting the holds pull list? Are pull lists updated dynamically to reflect new incoming requests and requests that are already filled by checkins?

10. Can the standard loan period for an item be shortened dynamically based on high demand? How is high demand determined? If high demand is based on holds, is it calculated based on total holds or the ratio of holds to holdable items?

11. Does your system allow materials to float? Describe the functionality, including how floating can be configured by item/material type.

12. What options does your system provide for denoting temporary shelving locations? For instance, if staff wanted to create a display of specific items that is intended to remain in place for two months, what would they do to ensure accuracy of location information? Are there methods for cutting down on handling items multiple times (e.g. reversion to a permanent location after a patron has checked out a display item)?

13. Describe your Offline Circulation process. Is it possible for SCLSNJ Automation staff to grab offline files after the fact without having been notified that the branch was going offline? Can the system process the offline files simultaneously? Are there any safeguards to prevent offline circulation processing from superseding any transactions that occurred after going online? How are circulation delinquencies handled in offline mode?

14. What notice options does your system provide for patrons (e.g., text, email, telephone, etc.)? Do staff and/or patrons have the ability to decide which notices they want to receive? Can patrons choose when they want to be notified (e.g. patron wants a courtesy notice 3 days before an item is due and on the day the item is due)?

15. Which patron notices can be sent via text? Do text notifications offer the ability to renew via a reply text?

16. Can billing notices be generated on a per-patron basis to include multiple items per notice?

17. Describe how a staff member would create a new patron record in your mobile and/or web-based circulation interface. Include screenshots. Can data entry templates be set up to guide staff through the registration process?

18. Is there a mechanism for validating patron address data formatting, either directly against the USPS database, or via a third-party (e.g. Quipu Group, InfoGroup/ReferenceUSA)?

19. When patrons pay fines online using e-commerce, how does your system record the transaction so that staff can easily identify the patron and payment transaction if there is a dispute?

20. When deleting an item that is marked as missing but has fines attached, is the fine information automatically retained on the patron card? If so, what type of item information (title, call number, etc.) is retained with the fine? For example, if an item is missing and the library wants to get it out of the system but there are fines attached that prevent its removal, can the fines be automatically kept on the patron's record?

21. How does your system handle circulation of generic items that have not been barcoded?

22. Describe tools to tracking in-house use of material, both for individual barcoded items and for generic item types.

23. Please include any other information about circulation you would like to share.

E.   OPAC/Discovery

1. Describe the capabilities within your system for searching and/or limiting searches by reading level. What information is required in the bibliographic or item records to allow this type of searching?

2. Does your general keyword search apply a "stop word" list? How is this list accessed and maintained?

3. Describe the functionality available in your system which prevents a searcher from arriving at a dead end (i.e. no results). Describe what your system offers as far as stemming, search suggestions, help in failed searches, fuzzy matching, type-ahead capabilities, automatic synonyms, etc.

4. List the eBook and eAudio vendors which can be integrated into your public interface for discovery and circulation. Provide an overview of the methods used by the user to access this content.

5. Describe how your system determines relevancy in search results. For instance, how do you ensure that popular titles such as "The Help" come to top of the results list? How does your system determine the display order for electronic versus paper copies of the same title?

6. Describe the capabilities in your system for weighting the print version of classics (such as "Pride and Prejudice") so that they come before other formats of the title in a result set sorted by relevance.

7. Does your relevancy algorithm include circulation or other usage data that might help predict a title's current level of interest or demand (possibilities may include recency of last order, number of holds or ratio of holds to copies, popularity as measured by non-SCLSNJ sources, like best seller lists or Amazon pre-sales)?

8. What options does your system support for highlighting titles which are new (e.g. facets, dynamic lists, etc.)?

9. Does your system support the ability for library staff to create lists of titles that can be displayed as a set through the public interface?

10. Please describe your indexing capabilities. What indexes come built into the system? How can existing indexes be edited? How can new indexes be created? Are there limits to the number of indexes? Can SCLSNJ control which MARC fields/subfields are indexed?

11. Does your system offer an option to sort results by popularity? If so, how do you define popularity?

12. Can search results be limited to include only on-shelf or available items?

13. Can the OPAC be configured to adjust the order in which holdings appear based on the search location by branch (e.g. for in-house catalog searches, local holding always appear first, followed by other branches, with options for alpha order, order by proximity, etc.)?

14. Does your system support the ability for patrons to create multiple lists of titles through the public interface?
    a. What printing, sharing and saving capabilities are available for these lists?
    b. Can patrons add specific item information to their lists for location and call number information?
    c. Are patrons able to export their saved lists for use outside of the ILS?
    d. If a bibliographic record is deleted from the catalog, is the title/author also deleted from any saved lists maintained by patrons?

15. Does your system support the ability to include canned searches on web pages outside of the public interface?

16. Does your system support the ability to place a search box with pre-defined limits (e.g. by branch, by item type, etc.) on other web pages, so that you can launch a specific search from other sites?

17. What options are available in the public interface/discovery layer to display electronic resource results without overwhelming the overall search results with these items?

18. Describe how facets are implemented in your system. Can SCLSNJ create facets on-demand?

19. Can programs from the library's event calendar product be integrated with search results? Can library website information be integrated with search results?

20. How does your public interface leverage authority records? How can they be used by patrons to help with search and discovery?

21. Can patrons self-register for or request a library card through the system as a staff-mediated process? Is it possible for patrons to self-register for an online-only card without staff mediation? Is there a means for the system to only permit certain users to self-register successfully based on zip code/address/GPS-bounded polygon?

22. Can patrons freeze or suspend individual holds? For instance, if a patron will be away for an extended period and doesn't want to miss holds while they're gone, can they specify a period of time during which their holds will not be satisfied? Describe how a frozen or suspended hold interacts with the rest of the hold queue. Can a patron be sent a reminder if they leave a hold frozen for a specified length of time to make sure they still want the item?

23. Does your product provide a "kids' catalog" interface with predetermined searches and graphical selectors?

24. Does your system provide a mobile version of the public interface which offers full searching and patron self-service options?

25. Is your public interface "device aware," reacting to the device used for access? For example, if a patron is accessing the library through a smartphone, is the mobile version of the public interface automatically displayed?

26. What types of innovative features are you currently developing for patrons (e.g. voice navigation, digital library cards, etc.)?

27. Please include any other information about the OPAC or discovery you would like to share.

F.   Other Modules

1. Does your system offer electronic resource management or display? If so:
   a. Does the product handle user authentication for electronic resources?
   b. Is the product designed to provide a single sign-on experience for patrons across the catalog and all other electronic resources?
   c. Does the product allow for integrated display of databases and results in the catalog? By what mechanism (e.g. MARC records for individual databases/periodicals, retrieval of results by API and subsequent integration with catalog resultset, etc.)?

      d. Does the product manage or consolidate usage statistics for individual databases?

2. Does your system offer an interlibrary loan management module? If so:
      a. Describe the scope of its functionality.
      b. To what degree does it integrate with other ILL request management tools (e.g. OCLC Worldshare, ILLiad, JerseyCat, etc.)? Can request information be fed directly into other tools without duplicate data entry?
      c. What notifications are available for updating patrons on receipt and processing of ILL requests? Can notification be sent via email, text, etc., as well as through any built-in ILS messaging system?
      d. Can patron requests be limited on a monthly or annual basis?
      e. Does your system include a patron request for purchase workflow that can feed directly into your ILL module? Is duplicate data entry required to move an item requested by a patron from the request into ILL?

3. Does your system offer a serials module? If so:
      a. Does it integrate directly with any vendor-provided subscription management tools?
      b. Can library staff check in multiple copies of a single title in one action?
      c. Does it provide a way to track and evaluate the overall performance of circulating periodical titles, even as individual issues are deleted from the system?
      d. Is there a mechanism for providing patrons the ability to place issue-level holds that does not also require every individual item to be barcoded?
      e. Does your system provide the ability to print routing slips when an issue is checked-in? How many routing slip templates can be configured?

4. Does your system offer a booking module? If so:
      a. Does it support multiple time scales (e.g. hourly (for in-house technology use), daily (for circulation of museum passes), weekly (for storytime theme kits), etc.)?
      b. Can patrons place their own bookings or reservations directly?
      c. Can patrons make booking requests that are then mediated by staff?
      d. What notification options are supplied for providing alerts and updates about bookings to patrons?

5. Does your system offer an outreach module? If so:
      a. Describe how your system supports functionality specific to homebound patron services.
      b. What features in your system facilitate the management of deliveries for groups of users, such as senior centers, senior residential facilities, etc.?
      c. Does your system provide a detailed history of the checkouts for each homebound patron, including periodical titles with specific issue information?

      d.   Does your system support the creation of profiles for patrons using home delivery services?

6. Please include any other information about these or other modules you would like to share.

G.   **Reports and Analytics**

1. Provide a list of the canned, pre-configured, or on-demand reports that come with the system. Can permission for running these reports be set more broadly than for the reporting module itself?

2. Does your system provide a flexible report generator which allows staff to easily query the database using field selectors, filters and criteria, rather than SQL or other advanced query experience? Describe the report generator available in your system, including screen shots, where applicable.

3. Does your system offer advanced SQL or equivalent access directly into the data set? Is this provided natively in your system? Or does it require another utility (such as Crystal Reports)? Describe any other high-level reporting or analytical capabilities available in your system.

4. Does your system provide a report dashboard module which can provide standard and customized statistics for executive-level decision-making regarding Library collections and usage? Please describe the reporting mechanisms available for this information.

5. Does your system offer multiple methods for exporting and/or downloading reports making the data universally accessible (e.g. csv, xls, pdf, etc.) to facilitate data manipulation, transfer and sharing? Please describe the output capabilities for the different types of reports available in your system.

6. What mechanisms are available to schedule reports to be emailed to staff on a one-time or regular basis? What levels of system access are required to edit the list of recipients?

7. Does your system offer the ability to utilize data from the MARC record in reports, including data from specific MARC tags and subfields? Please describe how your system facilitates this type of reporting capabilities.

8. Describe and provide examples of how your system can provide us with data related to patron searches (e.g. search strategies used, facets clicked on, etc.).

9. Does your system provide built-in circulation and collection performance reporting for nonfiction collections based upon Dewey call number century and Dewey call number decade? Can it ignore prefixes (like J or LP) as part of the reporting?

10. Does your system provide built-in circulation and collection performance reporting for fiction collections based upon genre subject headings?

11. If it does not already, are there plans for your system to provide a way to store anonymized individual patron transaction data for the purposes of patron analytics and market segment analysis?

12. How long is individual transaction data stored? For instance, if we needed to troubleshoot the transit timeline for a particular item, how far back could we go to pull transactions for that specific item?

13. Please include any other information about reporting and analytics you would like to share.

H.   **IT and System Administration**

1. System administration can greatly affect the success of an ILS implementation as well as ongoing upgrades. SCLSNJ is expected to provide services 24 hours a day, so only short, pre-scheduled downtime will be acceptable.
   a. Describe the methodologies and tools utilized by your system both for client software upgrades and for web-based modules.
   b. How does your system ensure that performance is not affected during regular system maintenance and when reports are run on a high-transaction system?
   c. How does your system ensure that performance is not affected during the updating and indexing process when large numbers of records are added to the system?

2. Please describe the processes for global editing bibliographic, item, patron, and any other records (if relevant) in your system? Describe the standard reindexing process after global changes are made.

3. What processes typically need to run overnight or after hours?

4. Does the system have to be taken down to perform a complete backup? How long would a backup take, given the general statistics listed on page 19?

5. Do you provide a mechanism for keeping a test system in sync with the production system? If so, how is this accomplished?

6. Does your system provide API access to the following? Please indicate if the APIs allow read-only or read-write functionality and how the APIs available distinguish your system from others.
    a. Bibliographic and item records
    b. Patron information (including all "My Account" features)
    c. Circulation transactions
    d. Acquisitions transactions
    e. Does your system provide other methods for accessing data within the application other than via API?
    f. Provide at least two (2) examples of projects by your customers that have made novel use of your APIs which might be of interest to SCLSNJ. If possible, please include one example of work with both a library customer and a third-party vendor, such as an app developer or self-check provider. Include contact information for each project.

7. How does the level of system access differ for customers utilizing your SaaS environment versus customers housing the server locally?

8. How does your company keep your system current with PCI compliance and other rapidly changing security issues related to financial transactions?

9. Please include any other information about system administration or IT-related features or functions you would like to share.

I. **Third-Party Integration**

1. SCLSNJ uses a large, ever-increasing number of third-party products which require integration or connectivity with the ILS. These products affect both the public and staff users of the ILS and include wide-ranging services such as eBooks, online database resources, discovery layers, circulation equipment and mobile apps. We understand tools like APIs, NCIP, and SIP are typically used to provide connections between systems. With this in mind, please answer the following:
    a. It seems that each ILS company markets its APIs as the best and most comprehensive. What specifically distinguishes your APIs from the competition?
    b. What are notable and distinguishing factors about your implementation of NCIP?
    c. What are notable and distinguishing factors about your implementation of SIP2? Is there an option to get an unlimited SIP2 license?
    d. Please describe existing integration technology that your company provides in addition to the three options (APIs, NCIP, and SIP2) mentioned here?
    e. What services and/or out-of-the-box setups does your company offer to streamline the setup of connecting to third-party products?

     f.   What is your 5-year roadmap for developing integration with 3rd party technologies?

2. Does your company work regularly with third-party vendors to develop new products and integrations? If so, please provide at least one (1) example of a new product or partnership either currently under development or released since September 2016.

3. Does your system provide integrations with collection agency services from Unique Management?

4. Does your system integrate with discovery layers and search interfaces such as EBSCO EDS or the Capira mobile app? How do these interfaces connect to your system (i.e. APIs, web services, etc.)?

5. Does your system integrate with e-book vendors, such as Overdrive? How do the systems integrate to save staff time in cataloging or loading Overdrive MARC records? Does the integration extend to being able to check out materials directly from the OPAC and for patrons to review their e-book checkouts alongside other materials in their account?

6. Does your system support the use of Google Analytics for catalog usage reports? Do you offer services to set this up?

7. Does your system integrate with the Groovix linux-based PC and print management product for patron authentication? If so, indicate if the integration is accomplished through SIP2, an API or other methods.

8. Which telephone notification and renewal system(s) can be integrated with your system?

9. List all vendors that can be used with your system for fine payment and processing.

10. List all vendors or products that can be used to handle point-of-sale payment.

11. Please include any other information about third-party integration you would like to share.

J.   Implementation, Migration and Support

1. Please provide a detailed implementation plan, assuming a 4-5 month timeline. The incumbent vendor should provide a proposal for a reimplementation of the system and a migration to their SaaS environment. In particular, please address the following:

- ○ Time frame from date of award of contract to a hypothetical first day 1 of system operations and acceptance
- ○ Vendor's responsibilities and key dates
- ○ SCLSNJ staff responsibilities and key dates
- ○ Procedures for ongoing project review
- ○ Pre-operations testing
- ○ Response-time testing
- ○ Acceptance of the system

2. Does your company provide on-site training for the system? Do you offer off-site or web-based training? Please describe what options are available here and then make sure related costs are included in the separate costs section.

3. Does your company provide any assistance with OPAC/Discovery design, configuration and implementation? Please describe what options are available and the costs involved with each option.

4. SCLSNJ may be interested in contracting for additional resources during the migration process. Does your company either provide additional implementation services options or recommend any partner organizations or consultants for the implantation project? If so, please describe. (Some possibilities may include EDI setup or setup of third-party interfaces via SIP or API.)

5. SCLSNJ would like to migrate several different types of data to the new system. Please summarize the necessary preparation and migration steps that would need to be taken, both by SCLSNJ staff and by your company, for each type of data. Also, summarize data that cannot be migrated.
   - ○ Patron information, including creation date, expiration date, last activity, profile, demographics (jurisdiction, gender, birthdate), notes, current checkouts, holds, unpaid bills and collection agency information.
   - ○ Patrons' saved lists.
   - ○ Profile information for Outreach patrons.
   - ○ Bibliographic information, including date the bibliographic record was added.
   - ○ Serial volume records and/or data.
   - ○ Item information, including date added, historical circulation counts, copy information (owning library, shelving location, current location or status, primary and secondary location), holds, and last activity.
   - ○ Holds information, including current status of items on hold, complete waiting list in order by date placed, and whether hold is for a title or a specific item or volume.
   - ○ Transaction information, including all open financial transactions associated with existing item and patron barcodes/IDs.
   - ○ Summary holdings and check-in history information for serial records.

- ○ Acquisitions fund and vendor records.
- ○ Active order records.

6. Describe your customer support structure, hours and resources for hardware support, operating system support and application/data support.

7. What are the hours and days of your live telephone support? On what days each year does the company provide either no support or limited support?

8. Is complete documentation and/or a complete user manual for your system available online?

9. Do you provide a customer portal for accessing documentation as well as interacting with your help desk and trouble ticket system? How many options or methods are available for reporting problems? Can the portal have different levels of access for Automation and front-line staff in order to separate ticket access from access to documentation and training?

10. Please describe the makeup and governance of the ILS user group, including any email lists, online resources and meetings provided through this group. Include contact information for the group(s) available.

11. Describe the process for gathering, evaluating, developing, prioritizing and implementing software improvement requests from the ILS user group.

12. Please include any other information about implementation, migration and support you would like to share.

K.   Vendor Stability and Experience

1. Please provide the following information for your company:
    a. Corporate office address and telephone
    b. Sales and/or customer service office serving New Jersey
    c. Name, title, telephone and email address for manager of implementation services
    d. Total earnings for the last 3 years
    e. Amount budgeted annually for Research and Development
    f. Dun & Bradstreet Number

2. Please indicate the size and allocation of staff (in FTE) who work directly with your company's ILS product(s):
    a. Research and Development
    b. Customer Service/Support

       c. Sales
       d. Administration
       e. Implementation
       f. Training

3. How many public library customers are currently running production versions of your ILS? How many are vendor hosted? Of those hosted, please provide the top two with the highest number of annual circulation transitions.

4. How many years has your company worked in the ILS marketplace?

5. Is your company currently for sale or involved in any negotiations to expand or to be acquired by another organization? If so, please explain.

6. Has your company been involved in a merger, acquisition, or reorganization in the last five years? If so, please describe.

7. Please list any pending litigation in which your company may be involved. Has your company ever defaulted on a contract or been involved in litigation for failure to comply with contract terms? If yes, explain.

6.2   Pricing

Pricing Summary

Provide up-front purchase costs for year one, and ongoing licensing, support or maintenance costs for years one through five.

	Year 1	Year 2	Year 3	Year 4	Year 5
Application Software Package - annual SaaS licensing/maintenance					
Indicate whether each module is included in SaaS package priced above, or separate pricing. Example:					
Circulation - client	*Included*	*Included*	*Included*	*Included*	*Included*
Data Analytics	*$500*	*$510*	*$520*	*$530*	*$540*
Acquisitions (including fund accounting)					
Cataloging					
Circulation - client					
Circulation - web-based					
OPAC/Discovery					
Serials					
Interlibrary Loan					
Electronic Resource Management					
Booking					
Outreach					
Inventory					
Reports					
Data Analytics/Dashboard					
OPAC language options - please list available languages and any additional price for each choice:					
Z39.50 client/server					
Enhanced record content ● Syndetics ● LibraryThing ● NoveList Select					

E-content discovery and integration (e.g. Overdrive, Hoopla, etc.)				
Interface with Unique Management collection agency				
Customer/Patron API				
Catalog API				
Unlimited SIP2 licensing				
Single SIP2 license				
Offline circulation				
Telephone notification				
Text notification				
Integration of Bibframe				
EDI configuration				
e-Commerce for use by patrons and staff				
Fully-functioning test and training system				
Data migration services ● Bibliographic ● Item ● Authority ● Patron ● Circulation transactions ● Acquisitions vendors, fund and orders ● Patrons' saved lists				
System policy configuration				
System customization and development				
Other migration or configuration expenses				
Training				
Training travel expenses				
Other implementation expenses				
Annual system hosting services				
Data storage costs				

Backup costs					
General support					
Premium-level support					
Include any other optional items described in your proposal					

- Cost quotes and payment terms should be included for all software and recommended equipment. Pricing should reflect a vendor-hosted solution for the system.
- If there is no added or separate cost for a specific line item, indicate that by entering $0 in the appropriate columns.
- If your system does not have a specific line item, indicate that by entering N/A in the appropriate columns.
- Please feel free to add items to the cost table if you have items which do not fit into the specific categories.
- If you would like to attach other documentation related to pricing, or if you want to provide more explanation regarding your pricing model, please do so **in addition** to this table.

6.3   Key Personnel

Identify the key personnel who would be involved with migration, implementation and training, and provide their qualifications in the form of a resume or CV for each.

6.4   References

Provide a list of three to five (3-5) references that accurately reflect the performance of the ILS and company support. References should include similar installations with regard to the of number of locations, population size, collection size, and transaction levels.

1. Library name:
   Address:
   Telephone:
   Contact name:
   Contact email:

2. Library name:
   Address:
   Telephone:
   Contact name:
   Contact email:

3. Library name:
   Address:
   Telephone:
   Contact name:
   Contact email:

4. Library name:
   Address:
   Telephone:
   Contact name:
   Contact email:

5. Library name:
   Address:
   Telephone:
   Contact name:
   Contact email:

6.5   AFFIRMATIVE ACTION
MANDATORY EQUAL EMPLOYMENT OPPORTUNITY LANGUAGE
N.J.S.A 10:5-31 et seq., N.J.A.C. 17:27
GOODS, PROFESSIONAL SERVICES AND GENERAL SERVICE CONTRACTS

During the performance of this contract, the contractor agrees as follows:

The contractor or subcontractor, where applicable, will not discriminate against any employee or applicant for employment because of age, race, creed, color, national origin, ancestry, marital status, sex, affectional or sexual orientation or sex. Except with respect to affectional or sexual orientation, the contractor will take affirmative action to ensure that such applicants are recruited and employed, and that employees are treated during employment, without regard to their age, race, creed, color, national origin, ancestry, marital status, affectional or sexual orientation or sex. Such action shall include, but not limited to the following: employment, upgrading, demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided by the Public Agency Compliance Officer setting forth provisions of this nondiscrimination clause.

The contractor or subcontractor, where applicable will, in all solicitations or advertisements for employees placed by or on behalf of the contractor, state that all qualified applicants will receive consideration for employment without regard to age, race, creed, color, national origin, ancestry, marital status, affectional or sexual orientation, gender identity of expression, disability, nationality or sex.

The contractor or subcontractor, where applicable, will send to each labor union or representative or workers with which it has a collective bargaining agreement or other contract or understanding, a notice, to be provided by the agency contracting officer advising the labor union or worker's representative of the contractor's commitment under this act and shall post copies of the notice in conspicuous places available to employees and applicants for employment.

The contractor or subcontractor where applicable, agrees to comply with any regulations promulgated by the Treasurer pursuant to **N.J.S.A. 10:5-31 et seq.** as amended and supplemented from the time to time and the Americans with Disabilities Act.

The contractor or subcontractor agrees to make attempt in good faith efforts to employ minority and women workers consistent with the applicable county employment goals established in accordance with **N.J.A.C 17:27-5.2**, or a binding determination of the applicable county employment goals determined by the Division, pursuant to **N.J.A.C. 17:27-5.2**.

The contractor or subcontractor agrees to inform in writing its appropriate recruitment agencies including, but not limited to, employment agencies, placement bureaus, colleges, universities, labor unions, that it does not discriminate on the basis of age, creed, color, national origin, ancestry, marital status, affectional or sexual orientation or sex, and that it will discontinue the use of any recruitment agency which engages in direct or indirect discriminatory practices.

The contractor or subcontractor agrees to revise any of its testing procedures, if necessary, to assure that all personnel testing conforms with the principles of job-related testing, as established by the statutes and court decisions of the State of New Jersey and as established by applicable Federal law and applicable Federal court decisions.

In conforming with the applicable employment goals, the contractor or subcontractor agrees to review all procedures relating to transfer, upgrading, downgrading and layoff to ensure that all such actions are taken without regard to age, creed, color, national origin, ancestry, marital status, affectional or sexual orientation or sex, consistent with the

statutes and court decisions of the State of New Jersey, and applicable Federal law and applicable Federal court decisions.

The contractor shall submit to the public agency, after notification of award but prior to execution of a goods and services contract, one of the following three documents
      Federal Letter of Affirmative Action Plan Approval
      Certificate of Employee Information Report
      Affirmative Action Employee Information Report (Form AA302 – available upon request)

The contractor and its subcontractor shall furnish such reports or other documents to the Division of Contract Compliance & EEO as may be requested by the Division from time to time in order to carry out the purposes of these regulations, and public agencies shall furnish such information as may be requested by the Division of Contract Compliance & EEO for conducting a compliance investigation pursuant to **Subchapter 10 of the Administrative Code at N.J.A.C.17:27**.

6.6   AFFIRMATIVE ACTION STATEMENT

<div align="center">

P.L. 1975, c. 127 (N.J.A.C. 17:27)
REQUIRED EVIDENCE

</div>

If awarded a contract, all procurement and service contractors will be required to comply with the requirements of P.L. 1975, c. 127, (N.J.A.C. 17:27). Within seven (7) days after receipt of the notification of intent to award the contract or receipt of the contract, whichever is sooner, the contractor should present one of the following to the Somerset County Library System Finance Director:

1. A letter from the U.S. Department of Labor that the contractor has an existing federally-approved or sanctioned Affirmative Action Program.

<div align="center">

OR

</div>

2. A Certificate of Employee Information Report Approval.

<div align="center">

OR

</div>

3. An Affirmative Action Employee Information Report (Form A.A. 302)

<div align="center">

OR

</div>

4. All successful contractors must submit at signing of the contract an Initial Project Manning Report (AA201) for any contract award that meets or exceeds the Public Agency bidding threshold (available upon request). NO FIRM MAY BE ISSUED A CONTRACT UNLESS THEY COMPLY WITH THE AFFIRMATIVE ACTION REGULATIONS OF P.L. 1975, c. 127

The following questions must be answered by all bidders:

1. Do you have a federally-approved or sanctioned Affirmative Action Program?

> YES _____ NO _____
> If yes, please submit a photo static copy of such approval.

2. Do you have a State Certificate of Employee Information Report Approval?

> YES _____ NO _____
> If yes, please submit a photo static copy of such certificate.

THE UNDERSIGNED CONTRACTOR CERTIFIES THAT HE IS AWARE OF THE COMMITMENT TO COMPLY WITH THE REQUIREMENTS OF P.L. 1975, c. 127 AND AGREES TO FURNISH THE REQUIRED DOCUMENTATION PURSUANT TO THE LAW.

> Company   _____
>
> Signature   _____
>
> Title   _____

NOTE: A CONTRACTOR MUST BE REJECTED AS NON-RESPONSIVE IF A CONTRACTOR FAILS TO COMPLY WITH THE REQUIREMENTS OF P.L. 1975, c. 127, WITHIN THE TIME FRAME.

6.7 NON-COLLUSION AFFIDAVIT

STATE OF NEW JERSEY
COUNTY OF _____ ss:

    I, _____ of the City of _____ in the County of _____ and the State of _____ of full age, being duly sworn according to law on my oath depose and say that:

    I am _____ of the firm of _____, the bidder making the Proposal for the above named project, and that I executed the said proposal with full authority so to do; that said bidder has not, directly or indirectly entered into any agreement, participated in any collusion, or otherwise taken any action in restraint of free, competitive bidding in connection with the above named project; and that all statements contained in said proposal and in this affidavit are true and correct, and made with full knowledge that the SOMERSET COUNTY LIBRARY COMMISSION relies upon the truth of the statements contained in said Proposal and in the statements contained in this affidavit in awarding the contract for the said project.

    I further warrant that no person or selling agency has been employed or retained to solicit or secure such contract upon an agreement or understanding for a commission, percentage, brokerage or contingent fee, except bona fide employees or bona fide established commercial or selling agencies maintained by

_____
(name of contractor)
(N.J.S.A. 52:34-25)

Subscribed and sworn to

before me this _____ day
of_____ , _____.

                                       _____
                                       (Also type or print name of affiant under signature)

_____
Notary public of

My Commission expires _____.

6.8 STOCKHOLDER DISCLOSURE CERTIFICATION

N.J.S.A. 52:25-24.2 (P.L. 1977 c 33)

Failure of the bidder/respondent to submit the required information is cause for automatic rejection.

CHECK ONE:

▢ I certify that the list below contains the names and addresses of all stockholders holding 10% or more of the issued and outstanding stock of the undersigned.

▢ I certify that no one stockholder owns 10% or more of the issued and outstanding stock of the undersigned.

LEGAL NAME OF BIDDER:_____

Check which business entity applies:

▢ Limited Partnership ▢ Subchapter S Corporation ▢ Limited Liability Corporation

▢ Partnership   ▢ Corporation Sole Proprietorship

▢ Limited Liability Partnership ▢ Other_____

Complete if the bidder/respondent is one of the 3 types of Corporations:

Date Incorporated:_____ Where Incorporated:_____

BUSINESS ADDRESS:

_____
Street Address   City   State   Zip

_____
Telephone#   Fax#

Listed below are the names and addresses of all stockholders, partners or individuals who own ten (10) percent or more of its stock of any classes, or who own ten (10) percent or greater interest therein.

_____
Name   Address

_____
Name   Address
CONTINUE ON ADDITIONAL SHEET IF NECESSARY: ▢ YES ▢ NO

Signature_____   Date_____

Printed Name & Title_____

6.9 AMERICANS WITH DISABILITIES ACT

Mandatory Language

Equal Opportunity for Individuals with Disabilities.

The CONTRACTOR and the SCLC do hereby agree that the provisions of Title II of the Americans With Disabilities Act of 1990 (the "Act") (42 U.S.C. s12101 et seq.), which Prohibits discrimination on the basis of disability by public entities in all services, programs, and activities provided or made available by public entities, and the rules and regulations promulgated pursuant thereunto, are made a part of this contract. In providing any aid, benefit, or service on behalf of the SCLC pursuant to this contract, the CONTRACTOR agrees that the performance shall be in strict compliance with the Act. In the event that the CONTRACTOR, its agents, servants, employees, or subcontractors violate or are alleged to have violated the Act during the performance of this contract, the CONTRACTOR shall defend the SCLC in any action or administrative proceeding commenced pursuant to this Act. The CONTRACTOR shall indemnify, protect, and save harmless the SCLC, its agents, servants, and employees from and against any and all suits, claims, losses, demands, or damages of whatever kind or nature arising out of or claimed to arise out of the alleged violation. The CONTRACTOR shall, at its own expense, appear, defend, and pay any and all charges for legal services and any and all costs and other expenses arising from such action or administrative proceeding or incurred in connection therewith. In any and all complaints brought pursuant to the SCLC'S grievance procedure, the CONTRACTOR agrees to abide by any decision of the SCLC, which is rendered pursuant to, said grievance procedure. If any action or administrative proceeding results in an award of damages against the SCLC or if the SCLC incurs any expense to cure a violation of the ADA which has been brought pursuant to its grievance procedure, the CONTRACTOR shall satisfy and discharge the same at its own expense.

The SCLC shall, as soon as practicable after a claim has been made against it, give written notice thereof to the CONTRACTOR along with full and complete particulars of the claim. If any action or administrative proceeding is brought against the SCLC or any of its agents, servants, and employees, the SCLC shall expeditiously forward or have forwarded to the CONTRACTOR every demand, complaint, notice, summons, pleading, or other process received by the SCLC or its representatives.

It is expressly agreed and understood that any approval by the SCLC of the services provided by the CONTRACTOR pursuant to this contract will not relieve the CONTRACTOR of the obligation to comply with the Act and to defend, indemnify, protect, and save harmless the SCLC pursuant to this paragraph.

It is further agreed and understood that the SCLC assumes no obligation to indemnify or save harmless the CONTRACTOR, its agents, servants, employees and subcontractors for any claim which may arise out of their performance of this Agreement. Furthermore, the CONTRACTOR expressly understands and agrees that the provisions of this indemnification clause shall in no way limit the CONTRACTOR'S obligations assumed in this Agreement, nor shall they be construed to relieve the CONTRACTOR from any liability, nor preclude the SCLC from taking any other actions available to it under any other provisions of this Agreement or otherwise at law.

6.10 BUSINESS REGISTRATION CERTIFICATE

Revised Contract Language for BRC Compliance

Goods and Services Contracts (including purchase orders)

* Construction Contracts (including public works related purchase orders)

N.J.S.A. 52:32-44 imposes the following requirements on contractors and all subcontractors that **knowingly** provide goods or perform services for a contractor fulfilling this contract:

1) the contractor shall provide written notice to its subcontractors and suppliers to submit proof of business registration to the contractor;

2) subcontractors through all tiers of a project must provide written notice to their subcontractors and suppliers to submit proof of business registration and subcontractors shall collect such proofs of business registration and maintain them on file;

3) prior to receipt of final payment from a contracting agency, a contractor must submit to the contacting agency an accurate list of all subcontractors and suppliers* or attest that none was used; and,

4) during the term of this contract, the contractor and its affiliates shall collect and remit, and shall notify all subcontractors and their affiliates that they must collect and remit to the Director, New Jersey Division of Taxation, the use tax due pursuant to the Sales and Use Tax Act, (N.J.S.A. 54:32B-1 et seq.) on all sales of tangible personal property delivered into this State.

A contractor, subcontractor or supplier who fails to provide proof of business registration or provides false business registration information shall be liable to a penalty of $25 for each day of violation, not to exceed $50,000 for each business registration not properly provided or maintained under a contract with a contracting agency. Information on the law and its requirements is available by calling (609) 292-9292.

6.11 DISCLOSURE OF INVESTMENT ACTIVITIES IN IRAN

Respondent: _____

   Pursuant to Public Law 2012, c. 25, any person or entity that submits a bid or proposal or otherwise proposes to enter into or renew a contract must complete the certification below to attest, under penalty of perjury, that the person or entity, or one of the person or entity's parents, subsidiaries, or affiliates, is not identified on a list created and maintained by the Department of the Treasury as a person or entity engaging in investment activities in Iran. If the Director finds a person or entity to be in violation of the principles which are the subject of this law, s/he shall take action as may be appropriate and provided by law, rule or contract, including but not limited to, imposing sanctions, seeking compliance, recovering damages, declaring the party in default and seeking debarment or suspension of the person or entity.

I certify, pursuant to Public Law 2012, c. 25, that the person or entity listed above for which I am authorized to submit a response/renew:

☐ is not providing goods or services of $20,000,000 or more in the energy sector of Iran, including a person or entity that provides oil or liquefied natural gas tankers, or products used to construct or maintain pipelines used to transport oil or liquefied natural gas, for the energy sector of Iran, **AND**

☐ is not a financial institution that extends $20,000,000 or more in credit to another person or entity, for 45 days or more, if that person or entity will use the credit to provide goods or services in the energy sector in Iran.

In the event that a person or entity is unable to make the above certification because it or one of its parents, subsidiaries, or affiliates has engaged in the above-referenced activities, a detailed, accurate and precise description of the activities must be provided in part 2 below to the Division of Purchase under penalty of perjury. Failure to provide such will result in the proposal being rendered as non-responsive and appropriate penalties, fines and/or sanctions will be assessed as provided by law.

_____

PART 2: PLEASE PROVIDE FURTHER INFORMATION RELATED TO INVESTMENT ACTIVITIES IN IRAN

You must provide, accurate and precise description of the activities of the bidding person/entity, or one of its parents, subsidiaries or affiliates, engaging in the investment activities in Iran outlined above by completing the boxes below.

NAME:_____Relationship to Respondent_____

Description of Activities_____

Duration of Engagement_____Anticipated Cessation Date:_____

Respondent/Offeror Contact Name_____ Contact Phone Number_____

   Certification: I, being duly sworn upon my oath, hereby represent and state that the foregoing information and any attachments thereto to the best of my knowledge are true and complete. I attest that I am authorized to execute this certification on behalf of the above-referenced person or entity. I acknowledge that SCLS is relying on the information contained herein and thereby acknowledge that I am under a continuing obligation from the date of this certification through the completion of any contracts with the Library to notify the Library in writing of any changes to the answers of information contained herein. I acknowledge that I am aware that it is a criminal offense to make a false statement or misrepresentation in this certification, and if I do so, I recognize that I am subject to criminal prosecution under the law and that it will also constitute a material breach of my agreement(s) with the Somerset County Library Commission and that the Library at its option may declare any contract(s) resulting from this certification void and unenforceable.

Full Name (Print)_____Signature: _____

Title_____

Date:_____

6.12   ACKNOWLEDGEMENT OF RECEIPT OF ADDENDA

The undersigned respondent hereby acknowledges receipt of the following

Addenda:

Addendum Number   Dated

_____   _____

_____   _____

_____   _____

Signed: _____

Title: _____

Printed Name: _____

Date: _____

Company: _____

Signature required only if addenda issued.

Category	One-Time $ Cost	Annual $ Cost
	(1)	(2)	(3)

	Category	One-Time $ Cost	Annual $ Cost
1	Application Software Services		
1.1	System Provision		
1.2	Customization/programming		
1.3	Profile Development and Setup		
1.4	Other ( )		
1.5	Web/Portal Servers		
1.6	Other server(s)		
1.7	Backup device		
1.8	Other		
1.9	SUBTOTAL		
2	Other Costs		
2.1	Data Extraction, Conversion, and Loading		
2.2	Training		
2.3	Training Travel Expenses		
2.4	Installation (including expenses)		
2.5	Other ( )		
2.6	SUBTOTAL		
3	Interfaces to other systems (same as Configuration #1)		
4	TOTAL SYSTEM COST		
5	5-Year Costs		

5.1
All One-time costs
5.2
Total of all recurring Costs for 5-years
5.3
Total 5-year Cost (Line 5.1 + 5.2)
(Note: These will be used to determine the quoted costs)