

**REQUEST**

***FOR***

***PROPOSAL***

***FOR***

**Library Collection Performance Software for the  
Ocean County Library**

**2022**

**OCEAN COUNTY LIBRARY COMMISSION**

**Request for Proposal for Library Collection  
Performance Software**

The Ocean County Library Commission is seeking a proposal for Library Collection Performance Software as detailed in the enclosed Request for Proposal (RFP).

Proposals must be submitted by June 21, 2022 at 1:00 pm at the Ocean County Library, 2<sup>nd</sup> Floor Administrative Offices, 101 Washington Street, Toms River, NJ 08753 and will be reviewed by a Library committee consisting of members of the management team, who may elect to conduct discussions with responsible proposers who submit proposals determined to be eligible for award, at a date determined by the Library.

If you have any questions regarding the project, please contact Tim Mailley, Technology Manager, at 732-349-6200, extension 5867.

**I. OVERVIEW**

The Ocean County Library Commission is soliciting proposals for Library Collection Performance Software, including hardware, software, shipping, training and ongoing maintenance for the Ocean County Library. The specifications/project scope for this Request for Proposal are attached (pages 16 – 19).

**II. PROPOSAL SUBMISSION**

Sealed proposals will be received by the Ocean County Library, 101 Washington Street, Toms River, NJ 08753 (attention: Phil Rosenow).

All proposals must include a **SEPARATE, SEALED ENVELOPE CONTAINING THE COST PROPOSAL**, bearing the name and address of the proposer, the name of the proposal and the date of the opening on the outside of the envelopes. Proposers must submit **ONE (1) original and ONE (1) copy** of all proposals. The person authorized to do so must sign the proposal in ink or ballpoint pen.

The Library will not be responsible for late mail deliveries and no proposals will be accepted if received after the time stipulated in the Request for Proposal.

Proposers shall complete and sign all procedural documents. Failure to do so may be cause for rejection.

The Library reserves the right to reject any or all proposals, or to waive any informality in the proposals and to accept any proposal deemed in the best interest of the Library.

The proposer, if awarded a contract, agrees to protect, defend, and save harmless the Library against any damage for payment for the use of any patented material process, article, or device that may enter into the manufacture, construction, or form a part of the work covered by either order or contract, and s/he further agrees to indemnify and save harmless the Library from suits or actions of every nature and description brought against it, for, or on account of injuries or damages received or sustained by any party or parties by, or from any of the acts of the contractor, his or her servants, or agents.

The proposer shall maintain Professional Liability Insurance in the amount of \$1,000,000.00 per occurrence with aggregate limits of \$3,000,000.00. Said insurance must remain in force until the final completion or termination of all work and services hereunder.

A copy of bidder's New Jersey Business Registration Certificate should be included with the proposal. Award cannot be made until certificate is provided.

Payments will be made upon the approval of vouchers submitted by the successful proposer in accordance with the requirements of the Library Commission and subject to the Library Commission's customary procedures.

Ocean County Library Commission will make the award within sixty (60) days after receipt of proposals. The Ocean County Library is exempt from any State sales tax or Federal excise tax.

All contractors must comply with the provisions of New Jersey Statute Title 40A:11-18, when applicable.

New Jersey Business Registration Requirements: 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:

- The contractor shall provide written notice to its subcontractors and suppliers to submit proof of business registration to the contractor;
- 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;
- Prior to receipt of final payment from a contracting agency, a contractor must submit to the contracting agency an accurate list of all subcontractors and suppliers or attest that none was used; and,
- 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 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 copy not properly provided or maintained under a contract with a contracting agency. Information on the law and its requirements are available by calling (609) 292-9292.

## **I. EVALUATION/SELECTION CRITERIA**

- A. Qualifications: Provide FOUR (4) professional references with addresses, contacts and phone numbers (40%)
- B. Experience: What have you worked on before that is similar to this project? (30%)
- C. Cost (30%)

## **II. GENERAL CONDITIONS TO THE PROPOSALS**

All proposals and other material submitted become the property of Ocean County Library and may be returned only at the Library's option. Information contained in the proposals will not be disclosed during the evaluation process. Under New Jersey's "Right to Know" laws, public records are required to be open to reasonable inspection. All proposal information, including detailed price and cost information, will be held in confidence during the evaluation process and prior to the time the Notice of Award is issued.

Each proposal shall include a statement indicating whether or not the firm or any individual working on the contract has a possible conflict of interest (e.g., themselves, spouse, or child employed by the Library) and if so, the nature of the conflict. The Library reserves the right to cancel the award if any interest disclosed from any source could either give the appearance of a conflict or cause speculations as to the objectivity of the project to be performed by the vendor. The Library's determination regarding any questions of conflict of interest shall be final.

The Library may exclude a proposer from submitting a proposal, or may reject a proposal after making a written determination that the proposer received payment for assistance in drafting the RFP, or gained substantial information regarding the RFP that was not available to the public.

Proposer must submit **ONE (1) original and one (1) copy** of their proposal in a sealed envelope marked **LIBRARY COLLECTION PERFORMANCE SOFTWARE**. Proposals must be submitted to the Ocean County Library, 101 Washington Street, Toms River, NJ 08753 (attention: Phil Rosenow). Oral proposals and proposals received via facsimile or other electronic means will not be accepted.

Proposers must provide a comprehensive narrative statement that illustrates their understanding of the requirements of the project and illustrates the methodology that will serve to accomplish the work.

The Library may elect to conduct discussions with responsible proposers who submit proposals

determined to be eligible for award. The purpose of these discussions will be to clarify and assure proposer's full understanding of, and responsiveness to, the solicitation requirements. Proposers reasonably eligible for award shall be accorded fair and equal treatment with respect to any opportunity for discussion and revision of proposals and revisions may be permitted after submissions and before award of the contract for the purpose of obtaining best and final offers. In conducting these discussions, the Library may not disclose information derived from proposals submitted by competing proposers.

Response format and content: The RFP sections that must be submitted and clearly defined in this order are:

- Cover Page
- Table of Contents
- Introduction, Background Statement
- Complete proposer information and a specific point of contact if questions should arise
- Response to General Conditions
- Organizational Chart and Qualifications
- Staff Qualifications
- References
- Required Documentation
- A statement acknowledging that the proposer shall comply with all conditions outlined

An officer of the company empowered to bind the company must sign the proposal. Failure to include these items may cause the proposal to be determined as non-responsive and the proposal may be rejected.

The cost proposal must include all direct and indirect costs associated with the performance of this service. Costs must include, but not be limited to, total number of hours of various professionals, direct expenses, payroll, supplies, overhead assigned to each person working on the project, percentage of each person's time associated with the project and profit.

**THIS PROPOSAL SHALL BE INCLUDED IN A SEPARATE SEALED ENVELOPE.**

To be considered, proposers must follow the instructions outlined in this document. Any exception to the terms, conditions or other requirements in any part of the RFP must be clearly stated in the proposal. Otherwise, the Library will consider that all proposals offered are in strict compliance with this RFP and the successful proposer will be responsible for compliance. The Library recognizes that proposers may have cost-saving ideas that would require them to stray from the specification in this document. Alternate proposals may be submitted for consideration only if the same proposer also provides a proposal based upon the specifications outlined in this document. Such alternate proposals shall be clearly marked with the words "Alternate Proposal" on each page of the proposal document.

After the Library's completion of the evaluation process, including any discussion held with proposers during the evaluation process, the Library may elect to initiate contract negotiations. The option of whether or not to initiate contract negotiations rests solely on the Library. If the Library elects to initiate contract negotiations, these negotiations cannot involve changes in the

Library's requirements or the proposal submitted, which would, by their nature, affect the basis of the source selection and competition previously conducted.

If the selected proposer fails to provide information to begin negotiations in a timely manner, if the proposer fails to negotiate in good faith, if the Library and proposer cannot mutually agree to an acceptable expenditure, or if the proposer and the Library after a good faith effort simply cannot come to terms, the Library may terminate negotiations with the proposer initially selected and commence negotiation with the next highest ranked proposer.

The Library shall award a contract under competitive sealed proposals to the responsible and responsive proposer whose proposal was determined in writing to be the most advantageous to the Library, taking into consideration price and the criteria set forth herein.

**NON - COLLUSION AFFIDAVIT**

STATE OF NEW JERSEY :

: ss

COUNTY OF \_\_\_\_\_ :

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  
Ocean County Library 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 \_\_\_\_\_.

(N.J.S.A. 52:3415). (Name of Contractor)

\_\_\_\_\_  
(Also type or print name of affiant under signature)

Subscribed and sworn to  
before me this \_\_\_\_\_  
day of \_\_\_\_\_, 20\_\_\_\_.

\_\_\_\_\_  
Notary Public of  
My commission expires

**EXHIBIT A**  
N.J.S.A. 10:5-31 and N.J.A.C. 17:27  
**MANDATORY EQUAL EMPLOYMENT OPPORTUNITY LANGUAGE**  
**Goods, Professional Services and General Service Contracts**  
**(Mandatory Affirmative Action Language)**

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, 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 be 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 for the 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 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 workers' representative of the contractor's commitments 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 time to time and the Americans with Disabilities Act.

The contractor or subcontractor agrees to make 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 and its subcontractors shall furnish such reports or other documents to the Division of Contract Compliance and 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.

**NOTICE TO ALL CONTRACTORS**  
**RE: AFFIRMATIVE ACTION REGULATIONS P.L. 1975 C. 127 (N.J.A.C. 17:27)**

A. ACTIVITY OF YOUR COMPANY- Indicate below:

- Procurement and/or Service Company
- Professional Consultant
- Other \_\_\_\_\_

B. **All Contractors, except Government Agencies, are required to comply with the above law.**  
TO ALL CONTRACTORS:

1. Within seven (7) days after receipt of the notification of intent to award the contract or receipt of the contract, whichever is sooner, a Contractor should present one of the following to the Library:
  - (a) An existing federally approved or sanctioned affirmative action program.
  - (b) A New Jersey Certificate of Employee Information Report Approval.
  - (c) If the Contractor cannot present "a" or "b", the Contractor is required to submit a completed Employees Information Report (Form AA302). This form will be made available to the Contractor by the Ocean County Library.

C. QUESTIONS BELOW MUST BE ANSWERED BY ALL CONTRACTORS:

1. Do you have a Federally approved or sanctioned Affirmative Action Program?  
Yes \_\_\_\_\_ No \_\_\_\_\_

- (a) If yes, please submit a photocopy of such approval.

2. Do you have a State of New Jersey "Certificate of Employee Information Report" approval?

Yes \_\_\_\_\_ No \_\_\_\_\_

- (a) If yes, please submit a photocopy 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 contract must be rejected as non-responsive if a contractor fails to comply with the requirements of:  
P.L.1975, C. 127. (N.J.A.C. 17:27)

## ***AMERICANS WITH DISABILITIES ACT***

### Equal Opportunity For Individuals With Disabilities

The CONTRACTOR and the LIBRARY do hereby agree that the provisions of title II of the Americans with Disabilities Act of 1990 (the "Act") (42 U.S.C. 12101 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 thereto, are made a part of this contract. In providing any aid, benefit, or service on behalf of the LIBRARY 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 LIBRARY in any action or administrative proceeding commenced pursuant to this Act. The CONTRACTOR shall indemnify, protect and save harmless the LIBRARY, 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 LIBRARY'S grievance procedure, the CONTRACTOR agrees to abide by any decision of the LIBRARY which is rendered pursuant to said grievance procedure. If any action or administrative proceeding results in an award of damages against the LIBRARY or if the LIBRARY 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 LIBRARY 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 LIBRARY or any of its agents, servants and employees, the LIBRARY shall expeditiously forward or have forwarded to the CONTRACTOR every demand, complaint, notice, summons, pleading, or other process received by the LIBRARY or its representatives.

It is expressly agreed and understood that any approval by the LIBRARY 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 LIBRARY pursuant to this paragraph.

It is further agreed and understood that the LIBRARY 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 provision 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 LIBRARY from taking any other actions available to it under any other provisions of this Agreement or otherwise at law.

The Ocean County Library does not discriminate on the basis of handicapped status in the admission or access to, or treatment, or employment in its programs or activities.

The Ocean County Library shall allow access to any books, documents, papers and records of the contractor, which are directly pertinent to that specific contract.

Compliance is required with all applicable standards, orders, or requirements issued under 306 of the Clean Air Act, Section 508 of the Clean Water Act, Executive Order 11738 and Environmental Protection Agency Regulations (40 CFR, Part 15) which prohibits the use under non-exempt federal contracts, grants or loans of facilities included on the EPA list of violating facilities.

“The Ocean County Library considers it to be a substantial conflict of interest for any company desiring to do business with the Library to be owned, operated or managed by any Library employee, nor shall any Library personnel be employed by the vendor in conjunction with any work to be performed for or on behalf of the Ocean County Library.”

I HEREBY CERTIFY COMPLIANCE WITH THE FOREGOING.

Partnership  
The undersigned is a Corporation under the law of the State  
Individual  
of \_\_\_\_\_, having principal offices  
at \_\_\_\_\_.

\_\_\_\_\_  
NAME OF COMPANY, CORPORATION OR INDIVIDUAL

- PLEASE PRINT -

**SIGNED BY:** \_\_\_\_\_

\_\_\_\_\_  
PRINT NAME AND OFFICIAL TITLE

**ADDRESS:** \_\_\_\_\_

**TELEPHONE:** \_\_\_\_\_

**E-MAIL ADDRESS** \_\_\_\_\_

**FEDERAL IDENTIFICATION NO.** \_\_\_\_\_

STATEMENT SETTING FORTH THE NAMES AND ADDRESSES OF STOCKHOLDERS  
OR PARTNERS OWNING MORE THAN 10% OF

\_\_\_\_\_  
(NAME OF ORGANIZATION)  
IN COMPLIANCE WITH CHAPTER 33 OF THE LAWS OF 1977.

The following constitute the names and addresses of all stockholders in the corporation if the corporation is a bidder, or partners if the bidder is a partnership who own 10% or more of the corporate stock of the bidder of any class or of all individual partners in the partnership who own 10% or greater interest therein.

In the event no stockholder or partner owns 10% or greater, please so indicate at the appropriate space on this form.

If one or more such stockholder or partner is itself a corporation or is a partnership, the stockholders holding 10% or more of that corporation's stock or the individual partners owning 10% or greater interest in that partnership are as follows:

PERCENTAGE OF OWNERSHIP

NAME \_\_\_\_\_ ADDRESS \_\_\_\_\_  
% \_\_\_\_\_

IF NO STOCKHOLDER OR PARTNER OWNS 10% OR MORE OF THE CORPORATE  
STOCK OR OWNERSHIP OF THE BIDDER, CHECK HERE \_\_\_\_\_

I certify that the foregoing information is correct.

\_\_\_\_\_  
Signature of Secretary or Partner

\_\_\_\_\_  
Print Name and Title

of \_\_\_\_\_  
Corporation or Partnership

**THIS FORM MUST BE COMPLETED AND SIGNED**

## DISCLOSURE OF INVESTMENT ACTIVITIES IN IRAN

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### PART 1: CERTIFICATION

**BIDDERS MUST COMPLETE PART I BY CHECKING EITHER BOX**  
FAILURE TO CHECK ONE OF THE BOXES WILL **RENDER THE BID NON-RESPONSIVE**;

Pursuant to Public Law 2012, e. 25, any person or entity that submits a bid or otherwise proposes to enter into or renew a contract must complete the certification below to attest, under penalty of perjury, that neither the person or entity, nor any of its parents, subsidiaries, or affiliates, is identified on the Department of Treasury's Chapter 25 list as a person or entity engaging in investment activities in Iran. The Chapter 25 list is found on the Division's website at <http://www.state.nj.us/treasury/purchase/pdf/Chapter25List.pdf>. Bidders **must** review this list prior to completing the below certification. **Failure to complete the certification will render a bidder's proposal non-responsive.** If the Director finds a person or entity to be in violation of 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 party.

#### PLEASE CHECK THE APPROPRIATE BOX:

**I certify, pursuant to Public Law 2012, c. 25, that neither the bidder listed below nor any of the bidder's parents, subsidiaries, or**

- affiliates is listed** on the N.J. Department of the Treasury's list of entities determined to be engaged in prohibited activities in Iran pursuant to P.L. 2012, c. 25 ("Chapter 25 List"). I further certify that I am the person listed below, or I am an officer or representative of the entity listed below and am authorized to make this certification on its behalf. **I will skip Part 2 and sign and complete the Certification below.**

**OR**

**I am unable to certify as above because the bidder and/or one or more of its parents, subsidiaries, or affiliates is listed on the Department's Chapter 25 list. I will**

- provide a detailed, accurate and precise description of the activities in Part 2 below and sign and complete the certification below.** 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.

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

You must provide a detailed, 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.

**PLEASE PROVIDE THOROUGH ANSWERS TO EACH QUESTION. IF YOU NEED TO MAKE ADDITIONAL ENTRIES, PLEASE ADD AN ADDITIONAL SHEET(S) OF PAPER.**

Name _____
Relationship to Bidder _____
Description of Activities _____
Duration of Engagement _____
Anticipated Cessation Date _____
Bidder 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 the County of Ocean 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 County to notify the County 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 County of Ocean and that the County at its option may declare any contract(s) resulting from this certification void and unenforceable.

Name of Bidder: \_\_\_\_\_

Full Name (Print): \_\_\_\_\_

Signature: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

**PROPOSAL DOCUMENT CHECKLIST**

**Proposal Title:** Library Collection Performance Software

Items required

Items submitted with bid

**A. FAILURE TO SUBMIT ANY OF THESE DOCUMENTS IS MANDATORY CAUSE FOR REJECTION OF PROPOSAL.**

- Statement of ownership (Chapter 33 of the Laws of 1977) \_\_\_\_\_
- \_\_\_\_\_ List of designated contractors \_\_\_\_\_
- Required documents as listed \_\_\_\_\_
- Acknowledgement of receipt of addenda or revisions (if issued) \_\_\_\_\_
- Copy of Proposer's New Jersey Business Registration Certificate \_\_\_\_\_
- \_\_\_\_\_ Copies of each insurance certificate \_\_\_\_\_

**B. FAILURE TO SUBMIT ANY OF THESE DOCUMENTS MAY BE CAUSE FOR REJECTION OF PROPOSAL.**

- Affirmative Action questionnaire \_\_\_\_\_
- Non-Collusion Affidavit \_\_\_\_\_
- \_\_\_\_\_ Catalog/price list \_\_\_\_\_
- \_\_\_\_\_ Product samples \_\_\_\_\_
- \_\_\_\_\_ Certified financial statement \_\_\_\_\_
- \_\_\_\_\_ Certification of available equipment \_\_\_\_\_
- Signature page \_\_\_\_\_
- Other: Activities in Iran Disclosure Form \_\_\_\_\_

**C. THE UNDERSIGNED BIDDER HEREWITH SUBMITS THE ABOVE REQUIRED DOCUMENTS.**

**PRINT NAME OF PROPOSER:** \_\_\_\_\_

**SIGNED BY:** \_\_\_\_\_

**PRINT NAME AND TITLE:** \_\_\_\_\_

**DATE:** \_\_\_\_\_

**THIS CHECKLIST SHOULD BE INITIALED, SIGNED, AND RETURNED WITH ALL DOCUMENTS.**

## **Specifications/Project Scope**

The Ocean County Library seeks proposals for Library Collection Performance Software including software, training, and ongoing maintenance for the Ocean County Library System.

### **Scope of Work:**

- A. Proposed software must be compatible with the Polaris ILS System.
- B. Proposed software must allow accounts/passwords to be configured using the software product at two levels: 1 – Administrator: Can access all areas of the software and create user accounts. 2 – User account: Access is restricted to certain areas of the software.
- C. When generated against detailed parameters/targets set by the library, all action plans can be printed directly from the solution or exported as a PDF, Word document, Excel spreadsheet, or RFID file.
- D. Action plans will show information for each item including: current location, author, title, date added, and last checkout date.
- E. Vendor must provide support using an implementation team to work with Ocean County Library to set up a library hierarchy and collection hierarchy. Action plans can then be generated for any area of the collection, within the branch, or system wide.
- F. Proposed software must provide tools to address all areas of the collection. Modules in the areas of Fiction (F), Nonfiction (NF), Non-book (NB) and eBook will include the following:
  - a. Collection Maintenance**
    - i. Collection check (F, NF, NB)
      - 1. Action plans for checking 'On Shelf' items to ensure that that catalog accurately reflects the actual position.
    - ii. Overdue check (F, NF, NB)
      - 1. Action plans for checking 'On Loan' items not returned for a long time, to ensure that that catalog accurately reflects the actual position.
  - b. Collection Demand**
    - i. Collection use summary (F, NF, NB, eBook)
      - 1. Summary of circulations across the collection. Identifies overstocked and understocked areas using status indicators. Highlights areas where purchase is required.
    - ii. Popular Author summary (F)
      - 1. Summary of fiction popular author provision, with indication of areas requiring top up through transfer.
    - iii. Popular Author transfer (F)

1. Finds matching underused titles and copies in other library branches. These are listed for possible transfer. Where no transfers are found, identifies recommended titles and numbers for purchase.
  2. Identifies possible transfers and creates a 'Selection List' allowing items to be selected by the user, adding them to the 'Transfer List.'
- iv. Popular Subject summary (NF)
1. Summary of non-fiction popular subject provision, with indication of areas requiring top up through transfer.
- v. Popular Subject transfer (NF)
1. Finds matching underused titles in other Library branches. These are listed for possible transfer. Where no transfers are found, identifies recommended titles and numbers for purchase.
  2. Identifies possible transfers and creates a 'Selection List' allowing items to be selected by the user, adding them to the 'Transfer List.'

**c. Collection Refresh**

- i. Dead items refresh (F, NF, NB)
  1. Creates an action plan for refreshing inactive/grubby items through replacement.
- ii. Grubby items refresh (F, NF, NB)
  1. Identifies dead items that can be used to replace grubby. Creates a 'Selection List' that allows specific items to be selected by the user on screen, adding them to the 'Transfer List.'
- iii. Collections too large in relation to demand subject summary (NF)
  1. Summary of overstocked non-fiction class ranges that library branches can swap to refresh their collections.

**d. Collection Removal**

- i. Grubby items summary (F, NF, NB)
  1. High level summary of current grubby items position.
- ii. Grubby items removal (F, NF, NB)
  1. Creates action plans to keep grubby or worn item amounts to a level which will be acceptable to customers.
- iii. Dead items summary (F, NF, NB, eBook)
  1. High level summary of current dead (inactive) items, with drill down option to action plan.
- iv. Dead items removal (F, NF, NB, eBook)
  1. Creates action plans to keep dead or inactive items to a level which will be acceptable to customers.

**e. Collection Action**

- i. Transfer list (F, NF, NB)
  1. Creates an action plan for transferring items between library branches.
- ii. Swap list (NF)
  1. Creates an action plan for swapping non-fiction items in

overstocked class number ranges between library branches.

- G. Proposed software shall provide access to circulation evidence from other North American public libraries. Search parameters will be created that will allow the identification of items that circulating well in other libraries across the county, but not currently owned by Ocean County Library. The software must allow carts to be built, exported, and sent to various vendors, including Baker & Taylor, directly.
- H. Proposed software must create evidence based spending plans to help understand where funds should be allocated. These can be created at a service level, down to branch/genre/subject.
- I. Proposed software must monitor what has been purchased against a specification, providing an insight into areas where more/less items are required.
- J. Proposed software must provide information on the performance of items that have been purchased across different periods of time.
- K. Proposed software must measure collection performance improvements over time as well as its effectiveness. This would include:
  - a. Transfer performance tool: number of items transferred and issues generated.
  - b. Dead items summary/detailed summary: Proportion of collection that has been unused for a defined period.
  - c. Breakdown of activity by user and report.
- L. Administrators must be able to build schedules where tasks are created (for a specific tool), given a completion date and then assigned to an individual in a branch. The status of each task must be able to be seen by the user assigned the task.
- M. Users can access the task that has been assigned to them and mark when complete. If the deadline is missed, the software program will send an automated reminder email.
- N. The software will assist the Ocean County Library System in floating their collection (or areas of the collection) to provide a safety net as items 'float' from location to location and help to keep collections balanced. The software will provide:
  - a. The option for branches with an overstocked collection (as items have floated here) to 'push' dead items to locations that require them (understocked as items have floated away) as there is evidence the item will circulate at this destination.
  - b. The option for branches with an understocked collection (as items have floated away) to 'pull' dead items from other overstocked locations where evidence suggests that they will circulate at this destination.

- c. Insight into the performance of items that have been transferred using the floating tools, location by location.
- O. Vendor will offer a US-based account manager and help desk (with normal business hours and 24-hour support log system available), and will offer a help and training section providing a video demonstration of each tool. An online forum must be available to access and share best practice with other users.