

# STATE OF CONNECTICUT

## *Connecticut State Library*

Purchasing Department

231 Capitol Avenue

Hartford, CT 06103

## INVITATION TO BID

SPECIFICATIONS & DOCUMENTS ATTACHED

**Bid No.:**

**CSL 2009-60-A**

**Bid Opening Date:**

**March 12, 2009**

**Bid Opening Time:**

**3:00 p.m. (ET)**

Purchasing Contact: Eyda J. Calderon  
Telephone: (860) 424-3603

Bid Class/Sub Class & Description: 5020-Computer Software, Package all types

**Questions concerning this bid must be received  
no later than: March 5, 2009 - 4:30 p.m. (ET) by:**

William Sullivan, Administrator  
iCONN – Connecticut's Re-Search Engine  
Connecticut State Library  
786 South Main Street  
Middletown, CT 06457  
Tel. (860) 704-2230  
Fax (860) 704-2229  
Email: [wsullivan@cslib.org](mailto:wsullivan@cslib.org)

Mail Bids to:

Sharon Brettschneider, Director  
Division of Library Development  
Connecticut State Library  
231 Capitol Avenue  
Hartford, CT 06106  
Tel. (860) 757-6665  
Fax (860) 757-6503

**Note:**

BIDS CANNOT BE ACCEPTED AFTER SPECIFIED BID OPENING TIME. VENDORS WILL NOT BE ADMITTED TO STATE BUILDINGS WITHOUT A VALID PHOTO I.D.

# STATE OF CONNECTICUT

## Connecticut State Library

### BIDDER'S CHECKLIST

THIS FORM IS NOT TO BE RETURNED WITH YOUR BID. HOWEVER, IT IS SUGGESTED THAT YOU REVIEW AND CHECK OFF EACH ACTION AS YOU COMPLETE IT.

- The Bid Proposal must be signed by a duly authorized representative of the company (unsigned bids are automatically rejected) and the Proposal Schedule must be included with your bid.
- The bid prices you have offered have been reviewed and verified.
- The price extensions and totals have been checked. (In case of discrepancy between unit prices and total prices, the unit price will govern the bid evaluation).
- Any errors, alterations, corrections or erasures to unit prices, total prices, etc. Must be initialed by the person who signs the bid proposal or his designee. Such change made and not initialed means automatic rejection of bid.
- The payment terms are NET 45 Days. Net Terms for periods less than 45 days (Ex. Net 30) may result in bid rejection. (You may offer cash discounts for prompt payment.) *Exception:* State of CT Small Business Set-Aside bids payment terms shall be in accordance with CGS 32-09h.
- Any technical or descriptive literature, drawing or bid samples that are required have been included with the bid.
- The delivery information block has been completed. (Be specific: In most cases, "as ordered" or "as required" is not complete information.)
- Any addenda to the bid have been signed and included.
- **Bid Proposal must include the information required in the Content Specifications.**
- **Three papers and three CD copies must be mailed, or hand-delivered** in time to be received no later than the designated opening date and time. Late bids are not accepted under any circumstances. Please allow enough time if mailing in your bid.
- All CHRO forms (4 pages) must be completed entirely regardless of the number of employees, even if the company is family owned and/or operated and must be submitted with each bid or bid may be rejected.
- MAKE SURE TO INCLUDE THE ORIGINAL PROPOSAL SCHEDULE PAGE.
- VENDOR'S NAMES MUST APPEAR ON ALL PROPOSAL SCHEDULES.
- VERIFY THE FOLLOWING FORMS ARE INCLUDED IN YOUR BID PACKAGE:
  1. **BID PROPOSAL** - 2 PAGES [COMPLETE AND SIGN]
  2. **BIDDER'S STATEMENT OF QUALIFICATIONS** - 2 PAGES [COMPLETE AND SIGN]
  3. **OSHA CERTIFICATE OF COMPLIANCE** [COMPLETE, SIGN AND NOTARIZE]
  4. **CHRO-4 FORMS** - 4 PAGES [COMPLETE AND SIGN]
  5. **PROPOSAL SCHEDULE** [COMPLETE AND SIGN]

**STATE OF CONNECTICUT**  
**Connecticut State Library**  
**Purchasing Department**  
**231 Capitol Avenue**  
**Hartford, CT 06103**

**BID PROPOSAL**

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Bid No: <b>CSL 2009-60-A</b>	Bid Opening Date: <b>March 12, 2009</b>	Bid Opening Time: <b>3:00 p.m.</b>
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*Note: Bidder means Individual/Sole Proprietor, Partnership or Corporation name.*

**IMPORTANT: Both pages of this form, Sections 1 through 3 must be completed, signed and returned by the bidder as part of the bid package. Failure to submit both pages constitutes grounds for rejection of your bid.**

Section 1 of 3 - **BIDDER INFORMATION**

COMPLETE BIDDER NAME (TRADE NAME, DOING BUSINESS AS)		SSN OR FEIN NUMBER
BIDDER ADDRESS	STREET	CITY STATE ZIP CODE
CONTACT NAME (TYPED OR PRINTED)	PHONE NUMBER (INCLUDE TOLL-FREE NUMBERS)	FAX NUMBER
SIGNATURE OF PERSON AUTHORIZED TO SIGN BIDS ON BEHALF OF THE ABOVE NAMED BIDDER		DATE
TYPE OR PRINT NAME OF AUTHORIZED PERSON		TITLE OF AUTHORIZED PERSON
BIDDER E-MAIL ADDRESS	BIDDER WEB SITE	
IS YOUR BUSINESS A: <input type="checkbox"/> PROPRIETORSHIP (INDIVIDUAL) <input type="checkbox"/> PARTNERSHIP OR <input type="checkbox"/> CORPORATION? (TYPE OF CORPORATION - _____)		
IS YOUR BUSINESS <b>CURRENTLY</b> A DAS CERTIFIED SMALL BUSINESS ENTERPRISE? <input type="checkbox"/> YES (ATTACH CERTIFICATE COPY TO BID) <input type="checkbox"/> NO		
IF YOUR BUSINESS IS A <b>PARTNERSHIP</b> , YOU <b>MUST</b> ATTACH THE NAMES AND TITLES OF ALL PARTNERS TO THIS BID WHEN RETURNED.		
IF YOUR BUSINESS IS A <b>CORPORATION</b> , IN WHICH STATE ARE YOU INCORPORATED?		
IS YOU ARE A <b>STATE EMPLOYEE</b> , INDICATE YOUR POSITION, AGENCY NAME & ADDRESS:		
IS YOUR BUSINESS REPORTABLE TO THE IRS? <input type="checkbox"/> YES <input type="checkbox"/> NO IF YES, A 1099/W2 WILL BE MAILED TO YOU AT YEAR-END.		
<b>REMITTANCE INFORMATION: IN THIS BOX, INDICATE THE REMITTANCE ADDRESS OF YOUR BUSINESS IF DIFFERENT FROM ABOVE.</b>		

**STATE OF CONNECTICUT**  
**Connecticut State Library**  
**Purchasing Department**  
**231 Capitol Avenue**  
**Hartford, CT 06106**

**BID PROPOSAL**

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**Bid No: CSL 2009-60-A**

Section 2 of 3 - **IMPORTANT INFORMATION FOR BIDDERS**

**AFFIRMATION OF BIDDER: The undersigned bidder affirms and declares:**

1. That this proposal is executed and signed by said bidder with full knowledge and acceptance of the provisions of the STANDARD BID AND CONTRACT TERMS AND CONDITIONS (3 pages) of current issue and in effect on the date of bid issue. The form Standard Bid and Contract Terms and Conditions are made a part of the contract.
2. That should any part of this proposal be accepted in writing by the Connecticut State Library within ninety (90) calendar days from the date of bid opening unless an earlier date for acceptance is specified by bidder in proposal schedule, said bidder will furnish and deliver the commodities and/or service for which this proposal is made, in the quantities and at the prices bid, and in compliance with the provisions of the STANDARD BID AND CONTRACT TERMS AND CONDITIONS, SECURITY REGULATIONS AND PROPOSAL SCHEDULE. Should award of any part of this proposal be delayed beyond the period of ninety (90) days of an earlier date specified by the bidder in proposal schedule, such award shall be conditioned upon bidder's acceptance.
3. Acceptance of the conditions set forth herein, agreement in strict accordance therewith, and will furnish and deliver the commodities and/or services to the Connecticut State Library in the PROPOSAL SCHEDULE at the prices bid therein.
4. **Should the Connecticut State Library determine that bidder has not completed Section 3 - Bidder Debarment and/or Suspension included as part of this document, then such determination may be just cause for disqualification from the evaluation of this bid.**

Section 3 of 3 - **BIDDER DEBARMENT AND/OR SUSPENSION**

The undersigned bidder further affirms and declares that neither the bidder and/or any company official nor any subcontractor to the bidder and/or any company official has received any notices of debarment and/or suspension from contracting with the State of Connecticut or the Federal Government.

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

The undersigned bidder further affirms and declares that neither the bidder and/or any company official nor any subcontractor to the bidder and/or any company official has received any notices of debarment and/or suspension from contracting with other states within the United States.

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

If the undersigned bidder and/or company official or any subcontractor to the bidder and/or any company official has received notices of debarment and/or suspension with the State of Connecticut, other states within the United States or Federal Government, said notices must be attached to this document when submitting this proposal.

Number of notices attached \_\_\_\_\_.

**SIGNATURE OF AUTHORIZED PERSON IN SECTION 1, CONSTITUTES AGREEMENT WITH ALL PROCEDURES INDICATED ABOVE.**

**STATE OF CONNECTICUT**  
**STATE OF CONNECTICUT**  
**BIDDER'S STATEMENT OF QUALIFICATIONS**

**Bid Number:**  
**CSL 2009-60-A**

Page 1 of 2

THIS FORM WILL BE USED IN ASSESSING A BIDDER'S QUALIFICATIONS AND TO DETERMINE IF THE BID SUBMITTED IS FROM A RESPONSIBLE BIDDER. STATE LAW DESIGNATES THAT CONTRACTS BE AWARDED TO THE LOWEST RESPONSIBLE QUALIFIED BIDDER. FACTORS SUCH AS PAST PERFORMANCE, INTEGRITY OF THE BIDDER, CONFORMITY TO THE SPECIFICATIONS, ETC. WILL BE USED IN EVALUATING BIDS. ATTACH ADDITIONAL SHEETS IF NECESSARY

COMPANY NAME: \_\_\_\_\_  
&  
ADDRESS: \_\_\_\_\_

NUMBER OF YEARS COMPANY HAS BEEN ENGAGED IN BUSINESS UNDER THIS NAME: \_\_\_\_\_ YEARS

LIST ANY CONTRACT AWARDS TO YOUR COMPANY BY THE STATE OF CONNECTICUT WITHIN THE LAST THREE (3) YEARS, **THAT YOU ACTUALLY PERFORMED SERVICE AGAINST.** INDICATE WHICH STATE AGENCY, AND PROVIDE CONTRACT NAME AND NUMBER, AND THE NAME AND TELEPHONE NUMBER OF THE PURCHASING AGENT ADMINISTERING THE CONTRACT..

<u>CONTRACT NO.</u>	<u>CONTRACT NAME</u>	<u>STATE AGENCY</u>	<u>PURCHASING AGENT</u>	<u>TEL. NO.</u>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

LIST ANY CONTRACT AWARDS TO YOUR COMPANY BY THE STATE OF CONNECTICUT WITHIN THE LAST THREE (3) YEARS. INDICATE WHICH STATE AGENCY, AND PROVIDE CONTRACT NAME AND NUMBER, AND THE NAME AND TELEPHONE NUMBER OF THE PURCHASING AGENT ADMINISTERING THE CONTRACT.

<u>CONTRACT NO.</u>	<u>CONTRACT NAME</u>	<u>STATE AGENCY</u>	<u>PURCHASING AGENT</u>	<u>TEL. NO.</u>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

LIST OTHER NAMES YOUR COMPANY GOES BY: \_\_\_\_\_  
\_\_\_\_\_

LIST PREVIOUS COMPANY NAME (S) \_\_\_\_\_  
\_\_\_\_\_

LIST AT LEAST THREE COMPLETED PROJECTS SIMILAR IN NATURE TO THIS **INVITATION FOR BIDS** WHICH DEMONSTRATES YOUR COMPANY'S ABILITY TO PERFORM THE REQUIRED SERVICES.

	<u>Company Name and Address</u>	<u>Telephone No.:</u>	<u>Dollar Value:</u>
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____

# STATE OF CONNECTICUT

## BIDDER'S STATEMENT OF QUALIFICATIONS

**Bid Number:**  
**CSL 2009-60-A**

Page 2 of 2

COMPANY NAME: \_\_\_\_\_

SIZE OF COMPANY  
OR CORPORATION:    NUMBER OF EMPLOYEES:    FULL TIME \_\_\_\_\_    PART TIME \_\_\_\_\_

COMPANY VALUE:    EQUIPMENT ASSETS \_\_\_\_\_    TOTAL ASSETS \_\_\_\_\_

IS YOUR COMPANY REGISTERED WITH THE OFFICE OF THE CONNECTICUT SECRETARY OF STATE?     YES     NO

REGISTRATION DATE, IF AVAILABLE: \_\_\_\_\_

IF REQUESTED, WOULD YOUR COMPANY PROVIDE A "GOOD STANDING" CERTIFICATE  
ISSUED BY THE CONNECTICUT SECRETARY OF STATE'S OFFICE?     YES     NO

LIST OF EQUIPMENT TO BE USED FOR THIS SERVICE (INCLUDE MODEL, YEAR & MANUFACTURER):

<u>MODEL</u>	<u>YEAR</u>	<u>MANUFACTURER</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

(Attach additional sheets if necessary)

LIST ANY RELEVANT CERTIFICATIONS, LICENSES, REGISTRATIONS, ETC. WHICH QUALIFY YOUR COMPANY TO MEET THE REQUIREMENTS  
OF THIS BID.

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(Attach additional sheets if necessary)

LIST ANY ADMINISTRATIVE ACTIONS EITHER PENDING REVIEW BY THE STATE OR DETERMINATIONS THAT THE STATE HAS MADE REGARDING YOUR COMPANY OR CORPORATION. THIS WOULD INCLUDE COURT JUDGEMENTS AND SUITS PENDING BY A STATE OR FEDERAL COURT. INCLUDE A LISTING OF OSHA VIOLATIONS AND ANY ACTIONS OR ORDERS PENDING OR RESOLVED WITH ANY STATE AGENCY SUCH AS THE DEPARTMENT OF CONSUMER PROTECTION, THE DEPARTMENT OF ENVIRONMENTAL PROTECTION, ETC. DETAIL THIS INFORMATION ON A SEPARATE SHEET OF PAPER. SUCH INFORMATION SHOULD BE FOR THE LAST THREE (3) YEARS.

I HEREBY CERTIFY THAT ALL THE INFORMATION SUPPLIED IS COMPLETE AND TRUE.

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
DATE

\_\_\_\_\_  
TITLE

**STATE OF CONNECTICUT**  
**Certificate of Compliance with**  
**Connecticut General Statute Section 31 - 57b**

**Bid Number:**  
**CSL 2009-60-A**

I hereby certify that all of the statements herein contained below have been examined by me, and to the best of my knowledge and belief are true and correct.

The \_\_\_\_\_ **HAS / HAS NOT**  
*Company Name* (Cross out Non-applicable)

been cited for three (3) or more willful or serious or serious violations of any Occupational Safety and Health Act (OSHA) or of any standard, order or regulation promulgated pursuant to such act, during the three year period preceding the bid, provided such violations were cited in accordance with the provisions of any State Occupational Safety and Health Act of 1970, and not abated within the time fixed by the citation and such citation has not been set aside following appeal to the appropriate agency of court having jurisdiction or **HAS / HAS NOT** (Cross out Non-applicable) received one or more criminal convictions related to the injury or death of any employee in the three-year period preceding the bid.

The list of violations (if applicable) is attached.

\_\_\_\_\_  
*(Name of Firm, Organization or Corporation)*

**Signed:**

\_\_\_\_\_  
*Written Signature:*

\_\_\_\_\_  
*Name Typed: (Corporation Seal)*

**Title:**

\_\_\_\_\_  
*(Title of Above Person, typed)*

**Dated:**

\_\_\_\_\_

*State of* \_\_\_\_\_ )

*County of* \_\_\_\_\_ ) *ss:* *A.D., 20* \_\_\_\_\_ )

Sworn to and personally appeared before me for the above, \_\_\_\_\_,  
*(Name of Firm, Organization, Corporation)*

Signer and Sealer of the foregoing instrument of and acknowledged the same to be the free act and deed of

\_\_\_\_\_, and his/her free act and deed as  
*(Name of Person appearing in front of Notary or Clerk)*

\_\_\_\_\_  
*(Title of Person appearing in front of Notary or Clerk)*

My Commission Expires:

\_\_\_\_\_  
*(Notary Public) (Seal)*

**STATE OF CONNECTICUT**  
**COMMISSION ON**  
**HUMAN RIGHTS AND OPPORTUNITIES (CHRO)**  
**CHRO-4**

<b>Bid Number:</b> _____
<b>CSL 2009-60-A</b>

**CONTRACT COMPLIANCE REGULATIONS**  
**NOTIFICATION TO BIDDERS**

The contract to be awarded is subject to contract compliance requirements mandated by Sections 4a-60 and 4a-60a of the CONN. GEN. STAT.; and, when the awarding agency is the State, Sections 46a-71(d) and 46a-81i(d) of the CONN. GEN. STAT. There are Contract Compliance Regulations codified at Section 46a-68j-21 through 43 of the Regulations of Connecticut State Agencies which establish a procedure for the awarding of all contracts covered by Sections 4a-60 and 46a-71(d) of the CONN. GEN. STAT.

According to Section 46a-68j-30(9) of the Contract Compliance Regulations, every agency awarding a contract subject to the Contract Compliance Requirements has an obligation to “aggressively solicit the participation of legitimate minority business enterprises as bidders, contractors, subcontractors, and suppliers of materials.” “Minority business enterprise” is defined in Section 4a-60 of the CONN. GEN. STAT. as a business wherein fifty-one percent or more of the capital stock, or assets belong to a person or persons: “(1) Who are active in daily affairs of the enterprise; (2) who have the power to direct the management and policies of the enterprise; and (3) who are members of a minority, as such term is defined in subsection (a) of section 32-9n.” Minority groups are defined in section 32-9n of the CONN. GEN. STAT. as “(1) Black Americans... (2) Hispanic Americans... (3) persons who have origins in the Iberian Peninsula... (4) Women... (5) Asian Pacific American and Pacific Islanders; (6) American Indians...” A business owned by an individual(s) with a physical disability is also a minority business enterprise as provided by Section 32-9e of the CONN. GEN. STAT. The above definitions apply to the contract compliance requirements by virtue of Section 46a-68j-21(11) of the Contract Compliance

The awarding agency will consider the following factors when reviewing the bidder’s qualifications under the contract compliance requirements:

- (A) the bidder’s success in implementing an affirmative action plan;
- (B) the bidder’s success in developing an apprenticeship program complying with Sections 46a-68-1 to 46a-68-17 inclusive, of the Regulations of Connecticut State Agencies;
- (C) the bidder’s promise to develop and implement a successful affirmative action plan;
- (D) the bidder’s submission of EEO-1 data indicating that the composition of its workforce is at or near parity when compared to the racial and gender composition of the workforce in the relevant labor market area; and,
- (E) the bidder’s promise to set aside a portion of the contract for legitimate minority business enterprises. See Section 46a-68j-30(10)(E) of the Contract Compliance Regulations.

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**INSTRUCTIONS AND OTHER INFORMATION**

**The following two (2) sided BIDDER CONTRACT COMPLIANCE MONITORING REPORT must be completed in full, signed, and submitted with the bid for this contract.**

The contract awarding agency and the Commission on Human Rights and Opportunities will use the information contained thereon to determine the bidder’s compliance to Sections 4a-60 and 4a-60a CONN. GEN. STAT., and Sections 46a-68j-23 of the Regulations of Connecticut State Agencies regarding equal employment opportunity, and the bidder’s “good faith efforts” to include minority business enterprises as subcontractors and suppliers for the work of the contract.

**1) Definition of Small Contractor**

Section 32-9e CONN. GEN. STAT. defines a small contractor as a company that has been doing business under the same management and control and has maintained its principal place of business in Connecticut for a one year period immediately prior to its application for certification under this section, had gross revenues not exceeding ten million dollars in the most recently completed fiscal year, and at least fifty-one percent of the ownership of which is held by a person or persons who are active in the daily affairs of the company, and have the power to direct the management and policies of the company, except that a non-profit corporation shall be construed to be a small contractor if such nonprofit corporation meets the requirements of subparagraphs (A) and (B) of subdivision 32-9e CONN. GEN. STAT.

**STATE OF CONNECTICUT**  
**COMMISSION ON**  
**HUMAN RIGHTS AND OPPORTUNITIES (CHRO)**  
CHRO-4

**Bid Number:**  
**CSL 2009-60-A**

**2) Description of Job Categories (as used in Part IV Bidder Employment Information)**

<p><b>Officials, Managers and Supervisors</b> - Occupations requiring administrative personnel who set broad policies, exercise over-all responsibility for execution of these policies, and direct individual departments or special phases of a firm's operations. Includes officials, executives, middle management, plant managers, department managers, and superintendents, salaried forepersons who are members of management, purchasing agents and buyers, and kindred workers.</p> <p><b>Professionals</b> - Occupations requiring either college graduation or experience of such kind and amount as to provide a comparable background. Includes: accountants and auditors, airplane pilots and navigators, architects, artists, chemists, designers, dietitians, editors, engineers, lawyers, librarians, mathematicians, natural scientists, personnel and labor relations workers, physical scientists, physicians, social scientists, teachers, kindred workers.</p> <p><b>Technicians</b> - Occupations requiring a combination of basic scientific knowledge and manual skill which can be obtained through about 2 years of post high school education, such as is offered in technical institutes and junior colleges, or through equivalent on-the-job training. Includes: draftspersons, engineering aides, junior engineers, mathematical aides, nurses, photographers, radio operators, scientific assistants, surveyors, technical illustrators, technicians (medical, dental, electronic, physical sciences), and kindred workers.</p> <p><b>Sales Workers</b> - Occupations engaging wholly or primarily in direct selling. Includes: advertising agents and sales persons, insurance agents and brokers, real estate agents and brokers, stock and bond salespersons, demonstrators, sales people and sales clerks, and kindred workers.</p> <p><b>Office and Clerical Workers</b> - Includes all clerical type work regardless of level of difficulty, where the activities are predominantly non-manual though some manual work not directly involved with altering or transporting the products is included. Includes: bookkeepers, cashiers, collectors (bills and accounts), messengers and office workers, office machine and computer operators, shipping and receiving clerks, stenographers, typists and secretaries, telegraph and telephone operators, and kindred workers.</p>	<p><b>Skilled Workers</b> - Manual workers of relatively high skill level having a thorough and comprehensive knowledge of the processes in their work. They exercise considerable independent judgment and usually receive an extensive period of training. Includes: building trades hourly paid forepersons and lead persons who are not members of management, mechanics and repair people, skilled machining occupations, compositors and typesetters, electricians, engravers, job setters (metal), motion picture projectionists, pattern and model makers, stationary engineers, tailors, and kindred workers.</p> <p><b>Semi-Skilled Workers</b> - Workers who operate machine or processing equipment or perform other factory type duties of intermediate skill level which can be mastered in a few weeks and require only limited training.</p> <p><b>Unskilled Workers</b> - Workers in manual occupations which generally require no special training. Perform elementary duties that may be learned in a few days and require application of little or no independent judgment. Includes: garage laborers, car washers and greasers, gardeners (except farm) and grounds keepers, longshore persons and stevedores, wood cutters and choppers, laborers performing lifting, digging, mixing, loading, and pulling operations, and kindred workers.</p> <p><b>Service Workers</b> - Workers in both protective and non-protective service occupations. Includes: attendants (hospital and other institution, professional, and personal service), barbers, cleaning workers, cooks (except house-hold), counter and fountain workers, fire fighters, police officers and detectives, security workers and doorkeepers, stewards, janitors, porters, food servers and kindred workers.</p> <p><b>Apprentices</b> - Persons employed in a program including work training and related instruction to learn a trade or craft which is traditionally considered an apprenticeship, regardless of whether the program is registered with a state or federal agency.</p> <p><b>Trainees</b> - Persons engaged in a formal training for craft worker when not trained under an apprenticeship program. Includes: operatives, laborer and service occupations. Also includes persons engaged in formal training for official, managerial, professional, technical, sales, office, and clerical occupations.</p>
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**3) Definition of Racial and Ethnic Terms (as used in Part IV Bidder Employment Information)**

<p><b>White</b> (not of Hispanic Origin) - All persons having origins in any of the original peoples of Europe, North Africa, or the Middle East.</p> <p><b>Black</b> (not of Hispanic Origin) - All persons having origins in any of the Black racial groups of Africa.</p> <p><b>Hispanic</b> All persons of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish culture or origin, regardless of race.</p>	<p><b>Asian or Pacific Islander</b> All persons having origins in any of the original peoples of the Far East, Southeast Asia, Indian subcontinent or Pacific Islands. Includes China, India, Japan, Korea, Philippine Islands, &amp; Samoa.</p> <p><b>American Indian or Alaskan Native</b> All persons having origins in any of the original peoples of North America, and who maintain cultural identification through tribal affiliation or community recognition.</p>
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**STATE OF CONNECTICUT**  
**COMMISSION ON**  
**HUMAN RIGHTS AND OPPORTUNITIES (CHRO)**  
CHRO-4

<b>Bid Number:</b>
<b>CSL 2009-60-A</b>

**BIDDER CONTRACT COMPLIANCE MONITORING REPORT**

**PART I - Bidder Information**

Company Name Street Address City & State Chief Executive	Bidder Federal Employer Identification Number (FEIN) or Social Security Number (SSN)
Major Business Activity (brief description)	Bidder Identification (response optional/definitions on page 1) -Is bidder a small contractor? <input type="checkbox"/> Yes <input type="checkbox"/> No
Bidder Parent Company (if any)	-Is bidder a minority business enterprise? <input type="checkbox"/> Yes <input type="checkbox"/> No If Yes, check ownership category
Other Locations in CT (if any)	<input type="checkbox"/> Black <input type="checkbox"/> Hispanic <input type="checkbox"/> Asian American <input type="checkbox"/> American Indian/Alaskan Native <input type="checkbox"/> Iberian Peninsula <input type="checkbox"/> Individual(s) with a Physical Disability <input type="checkbox"/> Female -Is bidder certified as above by the State of CT (DAS)? <input type="checkbox"/> Yes <input type="checkbox"/> No

**PART II - Bidder Non-Discrimination Policies & Procedures**

1. Does your company have a written Equal Employment Opportunity statement posted on company bulletin boards? <input type="checkbox"/> Yes <input type="checkbox"/> No	7. Do all of your company contracts and purchase orders contain non-discrimination statements as required by Sections 4a-60 & 4a-60a of the Conn. Gen. Stat.? <input type="checkbox"/> Yes <input type="checkbox"/> No
2. Does your company have a written sexual harassment in the workplace policy posted on company bulletin boards? <input type="checkbox"/> Yes <input type="checkbox"/> No	8. Do you, upon request, provide reasonable accommodation to employees or applicants for employment who have physical or mental disability? <input type="checkbox"/> Yes <input type="checkbox"/> No
3. Do you notify all recruitment sources in writing of your company non-discrimination employment policy? <input type="checkbox"/> Yes <input type="checkbox"/> No	9. Does your company have a mandatory retirement age for all employees? <input type="checkbox"/> Yes <input type="checkbox"/> No
4. Do your company advertisements contain a written statement that you are an Equal Opportunity Employer? <input type="checkbox"/> Yes <input type="checkbox"/> No	10. If your company has 50 or more employees, have you provided at least two (2) hours of sexual harassment training to all of your supervisors? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA
5. Do you notify the CT State Employment Service of all employment openings with your company? <input type="checkbox"/> Yes <input type="checkbox"/> No	11. If your company has apprenticeship programs, do they meet the equal opportunity requirements of the apprenticeship standards of the CT Dept. of Labor? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA
6. Does your company have a collective bargaining agreement with workers? <input type="checkbox"/> Yes <input type="checkbox"/> No	12. Does your company have a written affirmative action plan? <input type="checkbox"/> Yes <input type="checkbox"/> No
6a. If yes, do the collective bargaining agreements contain non-discrimination clauses covering all workers <input type="checkbox"/> Yes <input type="checkbox"/> No	13. Is there a person in your company who is responsible for Equal Employment Opportunity? <input type="checkbox"/> Yes <input type="checkbox"/> No
6b. Have you notified each union, in writing, of your commitments under the non-discrimination requirements of contracts with the State of CT? <input type="checkbox"/> Yes <input type="checkbox"/> No	If yes, provide name and phone number.

**PART III - Bidder Subcontracting Practices**

1. Will the work of this contract include subcontractors or suppliers? <input type="checkbox"/> Yes <input type="checkbox"/> No
1a. If yes, list all the subcontractors and suppliers and report if they are a small contractor and/or a minority business enterprise (as defined on page 1). Attach additional sheets if necessary.
1b. Will the work of this contract require additional subcontractors or suppliers other than those identified in 1a. above? <input type="checkbox"/> Yes <input type="checkbox"/> No

# STATE OF CONNECTICUT

## COMMISSION ON HUMAN RIGHTS AND OPPORTUNITIES (CHRO) CHRO-4

<b>Bid Number:</b>
<b>CSL 2009-60-A</b>

### PART IV - Bidder Employment Information

JOB CATEGORY	OVERALL TOTALS	WHITE (NOT OF HISPANIC ORIGIN)		BLACK (NOT OF HISPANIC ORIGIN)		HISPANIC		ASIAN / PACIFIC ISLANDER		AMERICAN INDIAN OR ALASKAN NATIVE	
		Male	Female	Male	Female	Male	Female	Male	Female	Male	Female
Officials/Managers											
Professionals											
Technicians											
Sales Workers											
Office/Clerical											
Craft Workers (Skilled)											
Laborers (Unskilled)											
Service Workers											
<b>TOTALS ABOVE</b>											
Total One Year Ago											
<b>FORMAL ON-THE-JOB TRAINEES (ENTER FIGURES FOR THE SAME CATEGORIES AS ARE SHOWN ABOVE)</b>											
Apprentices											
Trainees											

According to the above employment report, is the composition of your workforce at or near parity when compared with the racial and gender composition of the workforce in the relevant labor market area?  Yes  No

### PART V - Bidder Hiring and Recruitment Practices

1. Which of the following recruitment sources are used by you? (Check yes or no, and report percentage used)				2. Check (✓) any of the requirements listed below that you use as a hiring qualification.		3. Describe below any other practices or actions that you take which show that you hire, train, and promote employees without discrimination.	
SOURCE	YES	NO	% of applicants provided by source	(✓)			
State Employment Service					Work Experience		
Private Employment Agencies					Ability to Speak or Write English		
Schools and Colleges					Written Tests		
Newspaper Advertisement					High School Diploma		
Walk Ins					College Degree		
Present Employees					Union Membership		
Minority/Community Organizations					Personal Recommendation		
Labor Organizations					Height or Weight		
Others (please identify)					Car Ownership		
					Arrest Record		
					Wage Garnishment		

**Certification** (Read this form and check your statements on it CAREFULLY before signing). I certify that the statements made by me on this BIDDER CONTRACT COMPLIANCE MONITORING REPORT are complete and true to the best of my knowledge and belief, and are made in good faith. I understand that if I knowingly make any misstatement of facts, I am subject to be declared in non-compliance with Section 4a-60, 4a-60a, and related sections of the CONN. GEN. STAT.

Signature	Title	Date Signed	Telephone
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# STATE OF CONNECTICUT

## Connecticut State Library

### Purchasing Department

231 Capitol Avenue

Hartford, CT 06106

### PROPOSAL SCHEDULE

BID NO. <b>CSL 2009-60-A</b>	DELIVERY:	TERMS	CASH DISCOUNT: %                      Days
BIDDER NAME:		SSN OR FEIN #:	
BIDDER ADDRESS:		TELEPHONE/EXT NO:	FAX NO:

**Payment terms are net 45 days. Any deviation may result in bid rejection. Bid prices shall include all transportation charges FOB state agency.**

ISSUED BY: Connecticut State Library		ATTENTION: Eyda J. Calderon	BID NO: <b>CSL 2009-60-A</b>
ADDRESS: 231 Capitol Avenue, Hartford, CT 06106			DATE ISSUED: 02/26/09
SHIP PREPAID TO (ABOVE AGENCY AT ADDRESS SHOWN UNLESS OTHER ADDRESS IS ENTERED HERE)			DATE AND TIME BID REQUIRED: <b>03/12/09 – 3:00 p.m.</b>
SIGNED FOR AGENCY:	TITLE: Fiscal Admin. Officer.	TELEPHONE: (860) 424-3603	DATE MATERIAL REQUIRED: See Content Specifications

Item No.	Description of Commodity and/or Service	Quantity	Unit of Measure	Unit Price	Total Price
DATE SUBMITTED:		PURCHASE ORDER ADDRESS (If different from bidders address above)			<b>TOTAL :</b>
AUTHORIZED SIGNATURE		PRINTED NAME:			
					\$

**STATE OF CONNECTICUT**  
**Connecticut State Library**  
**Purchasing Department**

**STANDARD BID AND CONTRACT TERMS AND CONDITIONS Page 1 of 3**

**All Invitations For Bids issued by the awarding agency of the State of Connecticut will bind Bidders to the terms and conditions listed below, unless specified otherwise in any individual Invitation For Bids.**

**Incorporated by reference into this contract are applicable provisions of the Connecticut General Statutes including but not limited to Sections 4a-50 through 4a-80 and applicable provisions of the Regulations of Connecticut State Agencies including but not limited to Sections 4a-52-1 through 4a-52-30.**

**The contractor agrees to comply with the statutes and regulations as they exist on the date of this contract and as they may be adopted or amended from time to time during the term of this contract and any amendments thereto.**

**Submission of Bids**

Bids must be submitted on forms supplied by the awarding state agency or as otherwise specified.

1. The time and date bids are due is given in each bid issued. Bids received after the specified time and date shall not be considered.
2. Incomplete bid forms may result in the rejection of the bid. Amendments to bids received by the awarding state agency after the time specified for opening of bids shall not be considered. The original proposal schedule shall be returned to the awarding state agency. Bids submitted in pencil shall be rejected. All bids shall be signed by a person duly authorized to sign bids on behalf of the bidder. Unsigned bids shall be rejected. The person signing the bid proposal or their authorized designee must initial errors, alterations or corrections on the original proposal schedule. In the event an authorized designee initials the correction, there must be written authorization from the person signing the bid proposal to the person initialing the erasure, alterations, or correction. Failure to do so shall result in rejection of bid for those items erased, altered or corrected and not initialed.
3. Conditional bids are subject to rejection in whole or in part. A conditional bid is defined as one which limits, modifies, expands or supplements any of the terms and conditions and/or specifications of the invitation for bids.
4. Alternate bids will not be considered. An alternate bid is defined as one which is submitted in addition to the bidders primary response to the invitation for bids.
5. Prices should be extended in decimal, not fraction, to be net, and shall include transportation and delivery charges fully prepaid by the Contractor to the destination specified in the bid, and subject only to cash discount.
6. Pursuant to Section 12-412 of the Connecticut General Statutes, the State of Connecticut is exempt from the payment of excise, transportation and sales taxes imposed by the Federal Government and/or the State. Such taxes must not be included in bid prices.
7. In the event of a discrepancy between the unit price and the extension, the unit price shall govern.
8. By its submission the Bidder represents that the bid is not made in connection with any other Bidder submitting a bid for the same commodity or commodities and is in all respects fair and without collusion or fraud.

**Guaranty or Surety**

9. Bid and or performance bonds may be required. Bonds must meet the following requirements: Corporation - must be signed by an official of the corporation above their official title and the corporate seal must be affixed over the signature; Firm or Partnership - must be signed by all the partners and indicate they are "doing business as"; Individual - must be signed by the owner and indicated as "Owner". The surety company executing the bond or countersigning must be licensed in Connecticut and the bond must be signed by an official of the surety company with the corporate seal affixed over their signature. Signatures of two witnesses for both the principal and the surety must appear on the bond. Power of attorney for the official signing the bond for the surety company must be submitted with the bond.

**Samples**

10. Accepted bid samples do not supersede specifications for quality unless sample is superior in quality. All deliveries shall have at least the same quality as the accepted bid sample.
11. Samples are furnished free of charge. Bidder must indicate if their return is desired, provided they have not been made useless by test. Samples may be held for comparison with deliveries.

**Award**

12. Award will be based on quality of the articles or services to be supplied, their conformance with specifications, delivery terms, price, administrative costs, past performance, and financial responsibility. The State reserves the right to award by item, group of items or total bid, and reserves the right to procure materials from the most economical source of acceptable supply. The State reserves the right to reject any and all bids or parts thereof, waive technicalities and to make awards in a manner deemed in the best interest of the State.
13. Procurement Services or the awarding state agency may reject any bidder in default of any prior contract or guilty of misrepresentation or any bidder with a member of its firm in default or guilty of misrepresentation.
14. The awarding state agency may correct inaccurate awards resulting from clerical or administrative errors.

**STATE OF CONNECTICUT**  
**Connecticut State Library**  
**Purchasing Department**

**STANDARD BID AND CONTRACT TERMS AND CONDITIONS Page 2 of 3**

**Contract**

15. The existence of the contract shall be determined in accordance with the requirements set forth above. However, the award of the contract is not an order to ship.
16. The Contractor shall not assign or otherwise dispose of their contract or their right, title or interest, or their power to execute such contract to any other person, firm or corporation without the prior written consent of the Department of Administrative Services and the awarding state agency.
17. Bidders have ten days after notice of award to refuse acceptance of the award; after ten days the award will be binding on the Contractor. If the Contractor refuses to accept the award within the ten-day period, the award will be made to the next lowest responsible qualified bidder.
18. Failure of a Contractor to deliver commodities or perform services as specified will constitute authority for the awarding state agency to purchase these commodities or services on the open market. The Contractor agrees to promptly reimburse the State for excess cost of these purchases. The purchases will be deducted from the contracted quantities.
19. Rejected commodities must be removed by the Contractor from State premises within 48 hours. Immediate removal may be required when safety or health issues are present.
20. Contractor agrees to: hold the State harmless from liability of any kind for the use of any copyright or uncopyrighted composition, secret process, patented or unpatented invention furnished or used in the performance of the contract; guarantee their products against defective material or workmanship; repair damages of any kind, for which they are responsible to the premises or equipment, to their own work or to the work of other contractors; obtain and pay for all licenses, permits, fees etc. and to give all notices and comply with all requirements of city or town in which the service is to be provided and to the State of Connecticut; to carry proper insurance to protect the State from loss.
21. Notwithstanding any provision or language in this contract to the contrary, the Commissioner of Administrative Services or the Commissioner of the awarding state agency may terminate this contract whenever he/she determines in his/her sole discretion that such termination is in the best interests of the State. Any such termination shall be effected by delivery to the Contractor of a written notice of termination. The notice of termination shall be sent by registered mail to the Contractor address furnished to the State for purposes of correspondence or by hand delivery. Upon receipt of such notice, the Contractor shall both immediately discontinue all services affected (unless the notice directs otherwise) and deliver to the State all data, drawings, specifications, reports, estimates, summaries, and such other information and materials as may have been accumulated by the Contractor in performing his duties under this contract, whether completed or in progress. All such documents, information, and materials shall become the property of the State. In the event of such termination, the Contractor shall be entitled to reasonable compensation as determined by the Commissioner of the Department of Administrative Services or the Commissioner of the awarding state agency, however, no compensation for lost profits shall be allowed.

**Delivery**

22. All products and equipment delivered must be new unless otherwise stated in the bid specifications.
23. Delivery will be onto the specified State loading docks by the Contractor unless otherwise stated in the bid specifications.
24. Deliveries are subject to re-weighing on State sealed scales.
25. Payment terms are net 45 days after receipt of goods or invoice, whichever is later, unless otherwise specified.
26. Charges against a Contractor shall be deducted from current obligations. Money paid to the State by the Contractor shall be payable to the Treasurer, State of Connecticut.

**Saving Clause**

27. The Contractor shall not be liable for losses or delays in the fulfillment of the terms of the contract due to wars, acts of public enemies, strikes, fires, floods, acts of God or any other acts not within the control of or reasonably prevented by the Contractor. The Contractor will give written notice of the cause and probable duration of any such delay.

**Advertising**

28. Contractors may not reference sales to the State for advertising and promotional purposes without the prior approval of the Department of Administrative Services, Procurement Services.

**Rights**

29. The State has sole and exclusive right and title to all printed material produced for the State and the contractor shall not copyright the printed matter produced under the contract.
30. The Contractor assigns to the State all rights title and interests in and to all causes of action it may have under Section 4 of the Clayton Act, 15 USC 15, or under Chapter 624 of the general statutes. This assignment occurs when the Contractor is awarded the contract.

**STATE OF CONNECTICUT**  
**Connecticut State Library**  
**Purchasing Department**

**STANDARD BID AND CONTRACT TERMS AND CONDITIONS Page 3 of 3**

31. Contractor agrees that it is in compliance with all applicable federal, state and local laws and regulations, including but not limited to Connecticut General Statutes Sections 4a-60 and 4a-60a. The Contractor also agrees that it will hold the State harmless and indemnify the State from any action which may arise out of any act by the contractor concerning lack of compliance with these laws and regulations.

32. All purchases will be in compliance with Section 22a-194 to Section 22a-194g of the Connecticut General Statutes related to product packaging. This contract is subject to the provisions of Executive Order No. Three of Governor Thomas J. Meskill promulgated June 16, 1971, the provisions of Executive Order No. Seventeen of Governor Thomas J. Meskill promulgated February 15, 1973 and section 16 of P.A. 91-58 nondiscrimination regarding sexual orientation, and the provisions of Executive Order No. Sixteen of Governor John G. Rowland promulgated August 4, 1999 regarding Violence in the Workplace Prevention Policy.

Incorporated by reference into this contract is Section 4-61dd(g)(1) and 4-61dd(3) and (f) of the Connecticut General Statutes which prohibits contractors from taking adverse action against employees who disclosed information to the Auditors of Public Accounts or the Attorney General.

**Contractor(s) shall be required to complete and sign “State of Connecticut Contract for General Letter Purchases” form upon award of bid.**

# Connecticut State Library Bid No. CSL 2009-60-A iCONN Licensed Database

## Content Specifications

The purpose of this bid is to select one vendor to provide statewide access for all Authorized Users to a general periodicals databases, a consumer health database, a general business database, a history database, a science database, and a biographies database for *iCONN.org*, *Connecticut's re-search engine*. Access to the databases MUST start on July 1, 2009. Testing (to ensure that access starts on July 1, 2009) MUST start no later than May 15, 2009.

Six (6) specific categories of database products are described in this section. Vendors MUST submit responses for all six (6) categories as one package.

Responses for each specific category MUST include content to meet the needs of all specified users. For example, a response for general periodicals MUST include content and interface(s) suitable for adult library patrons, college students and faculty, teachers and K-12 students in all grade levels.

Responses for a specific category may include different databases to meet the content and interface needs of varied audiences but the response MUST provide all authorized users with access to all proposed databases. For example, high school students MUST be permitted to use the academic database; middle school students MUST be permitted to use the elementary database, etc.

### **GENERAL PERIODICALS**

The General periodical database(s) MUST consist primarily of articles from magazines and journals and MUST include all editorial content for titles (rather than selected articles). All articles MUST include at a minimum indexing, citation and/or abstracting. The majority of articles MUST be available in full text. The periodicals database(s) MUST meet the general research needs of:

- Adult public library patrons
- College and university students and faculty
- High school students and teachers
- Middle school students and teachers
- Elementary school students and teachers

This need is currently served by the following Cengage Gale databases:

- *Academic OneFile*
- *Discovering Collection\**
- *Educator's Reference Complete*
- *Expanded Academic ASAP*
- *General OneFile*
- *General Reference Center Gold*
- *InfoTrac Junior Edition*
- *InfoTrac Student Edition*
- *¡Informe!*
- *Kids InfoBits*
- *Legal Trac*

\* This resource is currently not available to college and university students and faculty.

## **BUSINESS**

The Business database(s) MUST include business periodical and newspaper articles. The database MUST also include company information (such as directories, financial information, links to company websites, etc.) and industry information (such as overviews, rankings, market share information, etc.). The database SHOULD include information on company subsidiaries. All articles MUST include at a minimum indexing, citations and/or abstracting. The majority of articles MUST be available in full text. Business database(s) MUST meet the general research needs of:

- Adult public library patrons
- College and university students and faculty
- High school students and teachers

This need is currently served by Cengage Gale's *Business & Company Resource Center*.

Indexing of standard bibliographic information is required. For articles, this includes Author(s), Article Title, Publication Name, Volume, Issue, Date, and Page numbers. Indexing also usually includes publisher or vendor-assigned keywords/descriptors/subjects for each article based on its primary topic(s). This is the minimum amount of information that needs to be machine searchable by the product's interface.

Abstracts summarize the article. If abstracting is not available, then it is customary that the first few sentences or paragraph of each article is also converted into machine-readable form.

## **CONSUMER HEALTH**

The Consumer Health database(s) MUST include a medical dictionary, a medical encyclopedia and full-text, consumer-oriented health periodical and newspaper articles. All articles MUST include, at a minimum, indexing, citations and/or abstracting. The majority of articles MUST be available in full-text. The Health database(s) MUST meet the general research needs of:

- Adult public library patrons
- College and university students and faculty
- High school students and teachers
- Middle school students and teachers

This need is currently served by Cengage Gale's *Health & Wellness Resource Center*.

## **HISTORY**

The History database(s) MUST include articles from magazines, journals, and books; biographies, documents and speeches; maps, photographs, film and video clips. Coverage MUST include the United States of America from its pre-history (before 1492 CE) to the present, and world history from the origins of human society (before 3500 BCE) to the present. All articles MUST include, at a minimum, indexing, citations and/or abstracting. The majority of articles MUST be available in full-text. The History database(s) MUST meet the general research needs of:

- Adult public library patrons
- College and university students and faculty
- High school and middle school students and teachers

This need is currently served by EBSCO's *History Reference Center*.

If not already included, the vendor should provide separate pricing to support the general research needs of elementary school students and teachers.

## **SCIENCE**

The Science database(s) MUST include articles from reference books, magazines and journals; biographies and images that cover life and physical sciences, earth and space sciences, health, medicine, and technology. All articles MUST

include, at a minimum, indexing, citations and/or abstracting. The majority of articles MUST be available in full-text. The Science database(s) MUST meet the general research needs of:

- Adult public library patrons
- College and university students and faculty
- High school students and teachers
- Middle school students and teachers

This need is currently served by EBSCO's *Science Reference Center*.

If not already included, the vendor should provide separate pricing for content to support the general research needs of elementary school students and teachers.

## BIOGRAPHIES

The Biography database MUST include biographical articles and media about notable persons, living and dead, in the fine arts, performing arts, government, science and religion from the United States of America and around the world. All articles MUST include, at a minimum, indexing, citations and/or abstracting. The majority of articles MUST be available in full-text. The Biography database(s) MUST meet the general research needs of:

- Adult public library patrons
- *College and university students and faculty (to be priced separately)*
- High school students and teachers
- Middle school students and teachers

This need is currently served by Cengage Gale's *Biography Resource Center*, except that it is not currently available to college and university students and faculty.

If not already included, the vendor should provide separate pricing for content to support the general research needs of elementary school students and teachers.

## QUESTIONS

1. What E-Reference books, if any, would you be willing to include at no additional charge?
2. Do you support limiting search results by Lexile Level? If so, please describe what limits are possible and which database(s) this applies to.
3. Do you provide alignment of K-12 content with Connecticut's curriculum standards? For an example of alignment at the state level, see <http://www.thinkfinityny.org/alignment.php>
4. Do you enable customers to customize the names of the databases on your site to ensure that (from the user's perspective) the database names are representative of their content? If so, please describe how this would be accomplished.
5. Do you provide an automatic text-to-speech translation service for articles? If so, which databases does this apply to? Do you plan to make it available for all proposed databases?
6. For which databases and languages, if any, do you offer multi-lingual translations by human translators (not machine translation)?
7. When searched by iCONN's current federated search system, will each database return to iCONN's federated search system in real time the numerical relevancy ranking score of each search result along with the scale that that score is based on?
8. Will you offer federated searching of licensed and public domain databases and library catalogs that your company does *not* supply? If so, please answer the following:
  - a. Will you present all search results in a single list *sorted by relevancy* and limited to full-text only (excluding library catalogs), and if so, how will you accomplish this?
  - b. When will this capability be available?
  - c. Will you provide authentication for both onsite and remote users equivalent to what is described in the license requirements portion of this bid? Please describe.
  - d. How will you manage, monitor and maintain the accessibility of these resources on an ongoing basis?

9. As an alternative to federated searching, if iCONN were to host a master index to all the content that iCONN subscribes to, as well as to library catalogs and other public domain resources, would you make all the content that you are proposing accessible to iCONN for indexing purposes, so that iCONN could provide online access to your licensed content through an iCONN-hosted master index? If so, would you support daily updating of the master index? In this model, iCONN search results would consist of citations that link to the content (on your server), not to the index (on our server). For an example of this model, see the New England Law Library Consortium’s Universal Search Solution (USS) Project at <http://www.nellco.org/index.cfm?pageId=505&parentID=504?> and <http://www.ala.org/ala/mgrps/divs/lita/litaevents/litaforum2008/NELLCO.pdf> and Index Data’s press release at <http://www.indexdata.dk/news/#2007-09-26>

**PRICING**

1. Your proposal should include separate pricing for the following Packages:

	<b>Package A</b>	<b>Package B</b>	<b>Package C</b>	<b>Package D</b>	<b>Package E</b>	<b>Package F</b>	<b>Package G</b>
<b>Gen. Periodicals*</b>	included	included	included	included	included	included	included
<b>Business*</b>	included	included	included	included	included	included	included
<b>Health*</b>	included	included	included	included	included	included	included
<b>History*</b>	included	-	-	-	included	included	included
<b>Science*</b>	included	-	-	included	-	included	-
<b>Biographies*</b>	included	-	included	included	-	-	included

\* As described above.

2. For each package above, please provide separate pricing for the following additional content:
- a. Content to support the general research needs of elementary school students and teachers for:
    - i. History – please include a description of this content
    - ii. Science – please include a description of this content
    - iii. Biographies – please include a description of this content
  - b. Reader’s Advisory Service for all ages (if available) – please include a description of this content
  - c. College and university students, faculty and staff access to Biographies

*Note:* Our preferred package is Package A. The request for variations in pricing is based on our need for flexibility based on any unanticipated changes in our budget. Our intent is to award this entire bid (as much as our budget permits) to ONE vendor.

**PROFESSIONAL REVIEW**

Every database that qualifies will be reviewed by a team of library professionals. The review will include content, functionality, usability and technical considerations. The content will be expected to meet the needs of the databases’ intended audiences. Proposing Vendors MUST agree to provide access, at no charge, to the proposed databases for the purposes of this professional review and for the duration of the evaluation period, as defined in the Procurement Schedule below.

The means of access to the test site MUST be a simple username and password. The test site MUST provide access to each individual database being proposed, and a representative example of a database with a Spanish search interface. The test site should also provide separately the capability for “federated searching” across all databases simultaneously (if available), as described in the License Requirements.

The test site MUST be organized in such a manner as to make it clear which database(s) are being proposed for which category (e.g., General Periodicals, Consumer Health, etc.).

## ONGOING COSTS

Type of Contract: *Multi-year Service Contract*

The contract period is for one three (3) year term beginning July 1, 2009. Options for three additional one year terms, renewable at the discretion of the State, MUST be included in the bid. Price MUST remain the same for the initial three (3) years. The bid MUST show the price for the first three years and the price for each of the three one-year extensions.

## VENDOR RESPONSES

Responding vendors MUST supply the following information:

- An itemized bid document listing all databases included in the bid and the costs described above.
- A document clarifying how the vendor database(s) meets the License Requirements.
- A document responding to all questions in the Content Specifications.
- A spreadsheet (in electronic format) for each proposed database listing all journals and magazines in the database that meet the following criteria:
  - The journal or magazine is in publication;
  - New issues are added to the database when published (the publication is active);
  - Full text and illustrations are included;
  - Embargo period does not exceed 7 days; and
  - The publication has an ISSN.
- A list of three references with current contact information. References MUST be large consortia or statewide contracts for services similar to those being proposed.

Vendors who can meet all of the mandatory requirements noted should provide a quotation giving all required costs for the database(s).

Immediately upon receipt, proposals will be reviewed for compliance with all mandatory requirements. To facilitate this review, Proposing Vendors MUST provide iCONN staff with immediate access to the test site as described above.

## PROCUREMENT SCHEDULE

<b>EVENT</b>	<b>DATE</b>
Post Bid on Web	On or about February 26, 2009
Clarification period ends	March 5, 2009 at 4:30 pm ET
Vendor proposals due	March 12, 2009 at 3:00 pm (ET)
Proposal evaluations completed	On or about April 16, 2009
Announce "Successful Vendor"	On or about April 16, 2009
Begin implementation	On or about April 17, 2009
Begin testing	May 15, 2009
Testing and implementation completed	July 1, 2009
Implementation of federated searching completed	August 1, 2009

# Connecticut State Library Bid No. CSL 2009-60-A iCONN Licensed Database

## License Requirements

### 1. ACCESS

#### Web Accessibility

All products proposed MUST be Web-accessible.

#### ADA Compliance

Databases and platform proposed MUST comply with the Connecticut Web Site Accessibility Policy, which is documented at <http://www.cmac.state.ct.us/access/policies/accesspolicy40.html>

#### Authorized Users

Authorized users of products to be licensed are the following groups:

- all persons holding a valid library card from one of the Connecticut public libraries.
- all students officially registered as full or part-time students in any public or private school, college or university in Connecticut.
- all faculty, teaching staff, administrators and employed staff in any public or private school, college or university in Connecticut.
- virtual reference librarians (such as Tutor.com) employed by any public or private school, college or university in Connecticut. Virtual reference librarians will use the databases only to assist Connecticut students and patrons. They will not use the iCONN databases to support students and patrons in other states.
- distance learners enrolled in classes offered, taught and managed at a Connecticut location of a Connecticut college or university.
- any of the groups above at any location in the world, with appropriate authentication.
- onsite users within the public libraries in the State of Connecticut
- onsite users within the public and private schools, colleges and universities in the State of Connecticut.
- onsite users at agencies of the three branches of state government.
- onsite users at libraries in Connecticut museums, historical societies and hospitals.
- all persons whose computer's IP address is determined by a geo-location service (provided by Quova - <http://www.quova.com/page.php?id=171>) to originate from within the state of Connecticut (applicable only to databases licensed to public and school libraries)

Connecticut public libraries are defined as the 195 Connecticut public libraries and their branches, the Connecticut State Library, the Middletown Library Service Center, the Willimantic Library Service Center, and the Library for the Blind and Physically Handicapped. Schools are defined as all public or private K-12 institutions in the state. The latest *Library Census*, which provides detailed information, including quantitative data, about these libraries, schools, colleges and universities, is located at <http://www.iconn.org/staff/documents/Library%20Census.pdf>.

Regarding licenses to academic databases, it should be noted that Charter Oak College's FTE count is already included in the FTE counts of all other schools and should therefore not be "double counted" when calculating license fees.

#### Authorized Uses

Vendor MUST not abrogate any rights of authorized users under the Fair Use provisions of United States and international copyright laws. In addition, the vendor MUST allow any database proposed to be used for purposes of research, education or other non-commercial use. Authorized users MUST have the right to:

- Electronically display the Licensed Materials.
- Download and digitally copy a reasonable portion of the Licensed Materials.
- Print a reasonable portion of the Licensed Materials.
- Make local digital copies of the Licensed materials in order to ensure efficient use by Authorized Users by appropriate browser or other software.
- Extract or use information contained in the Licensed Materials for educational, scientific, or research purposes, including extraction and manipulation of information for the purpose of illustration, explanation, example, comment, criticism, teaching, research, or analysis.
- Use a reasonable portion of the Licensed Materials for use in connection with specific courses of instruction offered by Licensee.

- Transmit to a third party in hard copy or electronically, minimal, insubstantial amounts of the Licensed Materials for personal use or scholarly, educational, or scientific research or use but in no case for resale or commercial purposes.

Authorized libraries may fulfill occasional requests from other institutions (by mail, fax or electronic transmissions), a practice commonly called Interlibrary Loan. Licensee agrees to fulfill such requests in compliance with Section 108 of the United States Copyright Law (17 USC §108, "Limitations on exclusive rights: Reproduction by libraries and archives") and the Guidelines for the Proviso of Subsection 108(2g)(2) prepared by the National Commission on New Technological Uses of Copyrighted Works.

The State Library (iCONN) recognizes that it shall not:

- Knowingly permit anyone other than Authorized Users to use the Licensed Materials.
- Modify, manipulate, or create a derivative work of the Licensed Materials without the prior written permission of Licensor.
- Remove, obscure or modify any copyright or other notices included in the Licensed Materials.
- Use the Licensed Materials for commercial purposes, including but not limited to the sale of the Licensed Materials, fee-for-service use of the Licensed Materials, or bulk reproduction or distribution of the Licensed Materials in any form.

#### **Account Setup:**

- Unique UserID: Vendor MUST assign a unique userID to each participating iCONN institution.
- User Classification: Vendor MUST assign a user classification (school, public library or college) to each participating institution.
- Consortia Code: Vendor MUST assign a code to all iCONN userIDs identifying them as an iCONN participant.

#### **Infrastructure / Additional Hardware and Software**

Authorized Users will be equipped with an appropriate PC, MAC or Linux computer and browser required to take advantage of graphical, web-based database products. All required additional software or browser plug-ins (e.g., Adobe PDF viewer, Shockwave, etc.) required to run successfully MUST be available at no cost. Vendor MUST maintain links to download sites for all required free supplemental software or plug-ins.

#### **Browser Compatibility**

Vendor MUST offer a WWW search interface and results screens that are easily navigated by PC, MAC and Linux based graphical browsers. At a minimum, proposed databases MUST be compatible with the most popular currently available versions of Internet Explorer, Firefox and Safari.

Vendor MUST maintain an easily accessible web page listing browsers that can and cannot be used with the proposed product and documenting set-up requirements and limitations.

#### **Mobile Device Compatibility**

Vendor SHOULD be able to support access by and the display of content on mobile devices, such as iPhone, preferably using automatic screen resizing. For example, see <http://www.google.com/mobile/> Please describe your experience and capability in supporting mobile devices.

#### **Filter and Firewall Compatibility**

Vendor MUST maintain an easily accessible web page listing firewalls and filters that can and cannot be used with the proposed product and documenting set-up requirements and limitations.

#### **Link Resolver Compatibility**

The database(s) MUST work with generally available OpenURL link resolvers. OpenURL linking for both inbound and outbound links is required. Inbound links MUST be supported at both the article and journal level. Please indicate which OpenURL link resolvers your databases support.

#### **Compatibility with E-Journal Finder Service**

Database(s) that include journal content MUST be compatible with iCONN's E-Journal Finder (provided by Serials Solutions) described at <http://www.iconn.org/staff/ejournals.aspx>. All links go directly to the database vendor. In-library authentication is based on IP address and remote access is based on library card number, both performed by the database vendor.

## **MARC 856 Records for Connecticut Union List of Serials (CULS)**

Vendor MUST provide a file of MARC 856 records for all titles in the proposed databases. Monthly updates are required.

### **Access Paths**

Users MUST be able to access the database through the iCONN portal or directly from a Vendor URL.

### **Authentication**

Proposed database(s) MUST authenticate iCONN portal validated users in accordance with Section 2 below.

Proposed database(s) MUST also provide IP authentication for onsite users and library card barcode authentication for remote users when accessing the Vendor database directly. Current direct links to vendor databases are listed at <http://www.iconn.org/staff/documents/VendorDirectURLs.pdf> and at <http://www.iconn.org/staff/urltable.aspx>.

Vendor MUST have successfully performed authentication as described above and in Section 2 below for at least one client. Please describe your experience and capability in performing authentication and provide at least one reference.

Vendor MUST work with iCONN staff to add iCONN branding (logo, customized text, etc.) to barcode login screen for remote users.

### **“Click-Through” Licenses**

The vendor MUST not require Authorized Users to agree to terms relating to the use of the databases before permitting Authorized Users to gain access to the materials (commonly referred to as “click-through” licenses). Further, the vendor MUST not use any “click-through” notices of licensing terms.

## **2. iCONN PORTAL COMPATIBILITY**

The proposed database(s) MUST be able to interact with the iCONN portal to authenticate users, maintain session state, process search requests and present search results. The vendor MUST agree to work cooperatively with the iCONN portal vendor to make the databases available by July 1, 2009 and on an ongoing basis. The following minimum requirements MUST be met:

### **Database Authentication:**

The proposed database MUST accept portal validated users and MUST support one of the following authentication methods:

- Referring URL (the iCONN Portal), including;
  - Multiple schools, libraries and colleges on the same referring URL.
  - Referring URL truncation. For example, if the referring URL is <http://portal.example.com/>, the Vendor MUST use a wildcard after the final slash because the search may originate from directories or pages deep within that URL.
  - Embedded library or school ID that allows Vendor to connect users to the correct library or school account.
- Launched username/password – The portal maintains tables of Vendor-provided usernames and passwords for each participating iCONN institution.

### **Session State:**

The proposed database(s) MUST be capable of maintaining session state without involving the portal once authentication is achieved.

### **Searching:**

The proposed database(s) MUST support HTTP querying requests coming from the portal software. In other words, it MUST allow the portal software to query the database(s) either through a GET or POST method. If GET is the method supported, a URL with embedded search parameters MUST be provided. If POST is the method supported, an HTML form MUST be provided. An example of an embedded URL:

<http://www.example.com/search?term1=cats&index1=keyword>

If authentication is by referring URL for multiple libraries, then the search URL MUST also support an embedded unique library ID. For example:

<http://www.example.com/search?term1=cats&index1=keyword&libid=12345>

Identify any additional Application Programming Interface supported, for example:

- Z39.50 (MUST return link to full record display)
- XML Gateway

### **iCONN Portal Validation (Information Only):**

Prior to issuing any database search requests, the iCONN Portal validates users by IP, public library card number, or college library card number.

**Onsite:** Onsite users (in authorized public libraries, schools, colleges, state agencies, and libraries in museums, historical societies and hospitals) are validated at the portal by IP address. A table of valid IP addresses is maintained at the portal. If an IP address is not recognized, a login screen is automatically presented to the user to permit validation by public or college library card number.

**Offsite:** Remote users are validated by library card number or by a library proxy (typically an academic institution using student ID). Proxy validated users are handled by the portal as onsite users – see the above description. To validate with a library card, users are required to enter their unique 14 or 9 digit library card bar code number. The portal checks the first 5 digits (agency code) of the barcode and validates against a database of authorized agency codes.

## **3. USABILITY ASSURANCE**

### **Usability Testing**

The vendor **MUST** have completed usability testing on the proposed products at least once.

- Describe the process (including sample of questions asked and user types tested) and changes implemented as a result of such testing.

### **Use by Children**

The system **MUST** provide a graphical/visual user interface with a simple design suitable for use by children (K-6). This applies only to content suitable for children (K-6) (it is not required for business, biography, history and science). (For an example of a graphical user interface, see Yakpac at <http://yakpac.liblime.com/>.)

The system **MUST** enable iCONN staff to limit the default database selection in federated searching to only those databases suitable for K-6.

### **Help and Error Messages**

The system **MUST** provide a context-sensitive online help facility for all services.

The help **MUST** be user-friendly and free of library jargon.

## **4. FUNCTIONALITY**

### **Searching**

The following search options **MUST** be available for the periodical databases:

- Keyword
- Boolean across fields
- Browse or "See Also"
- Truncation
- Date or range
- Exact journal title
- Author name

The following search options **SHOULD** be available for the periodical databases:

- Controlled subject vocabulary
- Lexile level

The system **MUST** allow for these Boolean operators, and their functionality **SHOULD** be clearly explained in context-sensitive help:

- AND
- OR
- NOT

The AND Boolean operator **MUST** be the implied default when more than one search term is entered in a field.

The system MUST allow for phrase searching. Describe how your system would interpret the following phrases:

- North Carolina
- Clinton Obama McCain

The system MUST allow the user to limit search results to peer-reviewed articles when such articles are available in a database. Please indicate which databases allow this limiter to be used.

The system MUST allow users to navigate among retrieved records.

The system MUST ignore variations in punctuation and use of upper and lower case letters when searching.

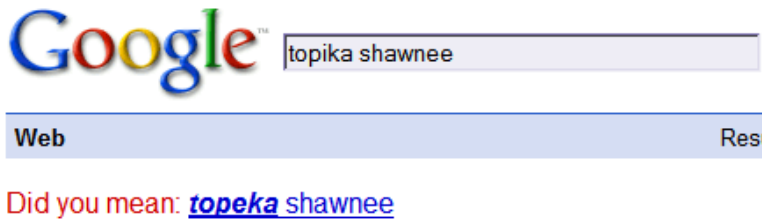
The system SHOULD support case-sensitive searches in the advanced search mode.

The system MUST suggest alternate spellings of search terms when no search results are returned. Please describe how the alternate spellings are generated.

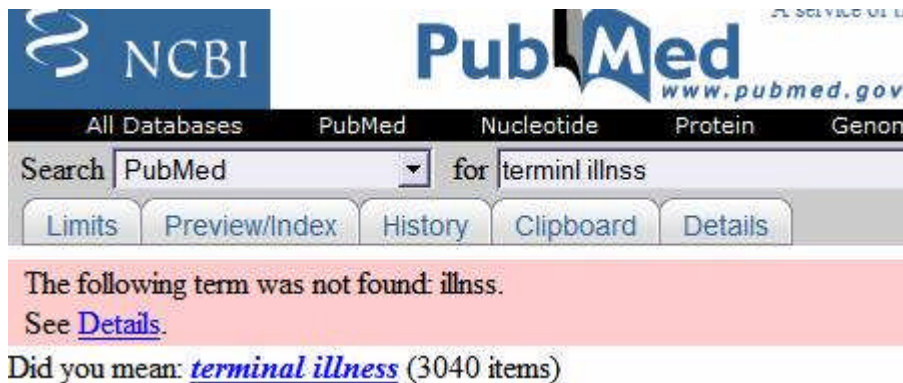
- iCONN SHOULD have the ability to turn this feature off if the suggested spellings are unsatisfactory to iCONN.
- Please provide examples of spelling suggestion.

Examples of good spelling suggestions:

Google: topika Shawnee turns into “did you mean Topeka Shawnee”?



PubMed – correctly reinterprets search & provides a link to the new (correct) search:



The system MUST display something on the screen while search is in progress, indicating that the search is taking place (i.e., the screen MUST not be blank while the system is searching).

The system MUST allow users to limit search results to full-text materials:

- It MUST be possible to set this limiter as the system default
- It MUST be possible for the user to remove this limit for specific searches

Advanced search features (e.g., Boolean, truncation, limits, field specific searches, etc.) SHOULD be appropriate to the database and easy to select.

### Refining Search

The system MUST allow users to easily modify a search, e.g., if results yield too many hits or not enough hits or to correct a misspelling.

-

- Instructions for search modification **MUST** be clear, and search modification **MUST** be permitted on the results screen and not require users to go back to the main search page.
- The system **SHOULD** offer recommendations when appropriate on how to narrow a search.

The system **MUST** allow users to re-sort a results list by:

- Relevancy
- Publication date

The system **SHOULD** allow users to re-sort a results list by Lexile level.

The system **MUST** allow users to refine a search using faceted browsing. Facets **SHOULD** include:

- Subjects
- Publication (e.g., journal title)
- Resource Type (e.g., article, image, streaming media, e-book)

The system **MUST** offer help whenever there are no search results, including:

- Presenting on the “no hits” or “error” page a search box with the original search term in it for easy revision

The system **SHOULD** link to Connecticut’s statewide virtual reference system from the “no hits” page.

### **Results Display**

Search results for magazine/journals and newspapers **MUST** contain:

- Article title
- Publication Title
- Full date (month/year for journals, month/day/year for newspapers)
- Author (if available)
- Starting page # (if available)
- Word count and/or # pages (if available)

Search results for magazine/journals and newspapers **SHOULD** contain the first few sentences where the search term(s) appear(s).

Search results **SHOULD** be clearly labeled as to the type or format of material – book, article, full-text, abstract, citation, etc. - contingent only upon the availability of the required metadata from the target resources.

- The labels **SHOULD** be easily distinguishable, possibly with text and images and with a small explanatory legend on each page.

The most relevant search results **SHOULD** be presented first (“above the fold”) by systemwide default.

- Upon request, the vendor will change this default to a different system default (e.g., publication date) for individual libraries.

The system **SHOULD** offer a persistent URL for saving and sharing individual citations retrieved from a search.

The system **SHOULD** offer a persistent URL for saving and sharing search results pages.

The system **SHOULD** change the color of records in a search results list after the records have been viewed.

**Search results delivered as sound or video files **MUST** launch quickly and **MUST** not require the purchase of additional software.**

- **If plug-ins are required to access information, vendor **MUST** provide easy, free access to software.**

### **End user delivery options**

End users **MUST** be able to print and e-mail the results of any search. A “printer friendly” option **MUST** be offered and be prominently displayed on results screens. Describe other end user delivery options that are available at no cost.

Users **SHOULD** be able to email individual citations or batches of citations retrieved from a search.

Users **SHOULD** be able to easily select and send search results to social networking sites, such as Facebook and MySpace; online bookmarking sites, such as del.icio.us; and aggregator sites, such as Google Reader, Bloglines, etc.

Search results SHOULD be able to be sent via SMS (Short Message Service) to a patron's cell phone. For example, see the "send via Text Message" option in Simmons College's OPAC at <http://tinyurl.com/52eu7q>.

Users SHOULD be able to create an alert for new results.

### **Bibliography Creation**

Databases MUST be able to create, print and download bibliographies based on current MLA and APA standard guidelines.

### **Citation Export**

Databases intended to meet the needs of students and faculty MUST be able to export citations to bibliographic management software such as EndNote, RefWorks, Reference Manager, Noodle Tools and Zotero. Please indicate which bibliographic management software tools you can export citations to.

### **Multi-lingual Support**

Database search interfaces MUST be available in Spanish. Please indicate what languages in addition to Spanish are available. It MUST be possible to link directly to a database with a multi-lingual search interface.

### **Federated Searching**

If the vendor is supplying multiple databases, it is highly desirable that:

- the vendor enable the user to search all and any combination of databases simultaneously using a single user interface, and
- the system present a single consolidated results list sorted (across all databases) by relevancy with no duplicate search results, and
- "sorting by relevancy" and "full-text only" can be set as the systemwide defaults.

Please describe in detail how the system determines relevancy.

The vendor MUST commit to implementing all of the above federated searching requirements by August 1, 2009.

It is highly desirable that federated searching, as described above, be present and available for hands-on evaluation as of the date of your proposal.

### **Search Box Widget**

The vendor SHOULD provide a search box widget which can be deployed on other web sites (e.g., other library or patron sites), as depicted at

<http://rqst-agent.auto-graphics.com/homepages/customerwide/IConnSearchBox.asp>

## **5. CONTENT**

### **Full Text**

The majority of articles in the proposed database(s) MUST be available in full text.

If, at any time during the term of this Agreement, Vendor offers 15% or more of the proposed Databases for free access through one or more freely available search engines on the Web, Vendor MUST reimburse the State Library in an amount that the withdrawal is proportional to the total Fees owed by the State Library under this Agreement.

Where applicable, Vendor MUST use reasonable efforts to ensure that the online content is: at least as complete as print versions of the Licensed Materials; represents complete, accurate and timely replications of the corresponding content contained within the print versions of such Materials; and MUST cooperate with the State Library to identify and correct errors or omissions.

## **6. CONFIDENTIALITY OF PATRON INFORMATION**

The system MUST not *retain* any personally identifiable information pertaining to how individuals use the system.

"Personally identifiable information" includes, but is not limited to, name, home address, phone number, fax number, e-mail address, IP address, library card number, and any profiling information supplied to the system. How individuals use the system includes information sought or received, search records and system reports.

- Vendor MUST maintain full control over its site to prevent any violation of this policy by a third party

Vendor MUST not *disclose* personally identifiable information pertaining to how individuals use the system to any third party except as required by law. "Personally identifiable information" includes, but is not limited to, name, home address, phone number, fax number, e-mail address, IP address, library card number, and any profiling information supplied to the system. How individuals use the system includes information sought or received, search records and system reports.

- Vendor MUST maintain full control over its site to prevent any violation of this policy by a third party

## **7. SERVICE LEVEL REQUIREMENTS**

### **Availability**

Products MUST be scheduled to be available 7 x 24 x 365, excepting regularly scheduled maintenance. Vendor guarantees that products will be available at least 99.9% of the time they are scheduled to be available. This limits the amount of downtime to no more than 8.6 hours per year (365 x 24 x 0.001).

Regularly scheduled maintenance and system updating that affect the performance or availability of the products MUST occur between Midnight ET and 6:00 AM ET. The vendor MUST provide at least one week's advance notice of the length of time that service will be interrupted. This does not preclude the responsibility of the vendor to perform emergency maintenance / system updating as needed in consultation with iCONN staff.

### **System Monitoring**

System MUST be monitored 24 hours a day, seven days a week. Vendor MUST notify iCONN staff of all unplanned service interruptions and report the time required to respond and restore service.

The vendor SHOULD respond to any unplanned service interruptions within 15 minutes, and SHOULD notify:

- all library staff within one hour by e-mail, and
- iCONN staff within one hour by phone during iCONN office hours (Monday – Friday, 7:00 AM ET – 4:30 PM ET) and by e-mail if the service interruption occurs outside iCONN office hours.

### **iCONN Staff Support**

If iCONN staff determines that in-depth technical information is required, Vendor MUST provide direct access to technical management and technical experts. Access MUST not be filtered through customer support or customer service personnel.

### **Application Support**

Describe support available to help use the database – such as developing search strategies or providing information about the extent of coverage for a particular title.

### **Application Support Options**

Vendor MUST provide toll-free telephone and e-mail application support to librarians, teachers and iCONN staff. 95% of calls MUST be responded to within one hour.

### **Application Support Hours**

Application support MUST be available between 8:30 a.m. ET and 5:00 p.m. ET Monday through Friday.

### **Technical Support**

Describe support available to help solve access problems.

### **Technical Support Options**

Vendor MUST provide toll-free telephone and e-mail technical support to librarians, teachers and iCONN staff. 95% of calls MUST be responded to within fifteen minutes.

### **Technical Support Hours**

Technical support MUST be available between 8:00 a.m. ET and 8:30 p.m. ET Monday through Friday and between 9:00 a.m. ET and 5:00 p.m. ET Saturday and Sunday.

### **Emergency Technical Support**

Vendor MUST provide librarians, teachers and iCONN staff with toll-free telephone and/or e-mail emergency technical support 7 x 24 x 365 (excluding New Year's Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day and Christmas Day) in the event that any library is unable to access any licensed database. Emergency support MUST be

able to quickly deploy resources able to fix access problems. Please describe how iCONN and library staff would be able to report access problems outside of your Technical Support Hours.

### **Communications**

Vendor MUST provide 7 days advance notice of scheduled downtimes and system changes that require changes by users, such as changes to web browsers, firewalls, filters or access URLs. Describe the method used to notify the iCONN Project Office and users of impending changes.

### **E-mail List**

Vendor MUST maintain a mailing list to notify users of product and support changes. Describe your mailing list capabilities.

### **Library Staff Training**

Vendor MUST provide at no charge at least ten 2-hour training sessions at locations selected by the State Library throughout Connecticut during each year of the first contract period and any contract renewal years. Describe other library staff training available.

### **Training Materials for Library Staff and Library Users**

Vendor MUST provide at no charge online training resources (tutorials, webinars and search tips) as shown at <http://www.iconn.org/staff/OnlineTrainingPublicSchool.aspx> and at <http://www.iconn.org/staff/OnlineTrainingAcademic.aspx>, and the ability for school librarians to qualify for CEU credits as described at <http://www.iconn.org/staff/CEU.aspx>). Describe any other end user training available.

### **Marketing Materials**

Vendor MUST offer, at no additional charge, co-branded marketing materials appropriate for librarians, teachers, and users (of all ages) and in sufficient quantities to satisfy the needs of all participating libraries. Examples of marketing materials currently being used are:

- Bookmarks: <http://www.iconn.org/ICONNBookmarks.aspx>
- Co-branded bookmark: [http://www.iconn.org/documents/GML07508\\_Kids\\_InfoBits\\_Bookmark\\_for\\_iCON.pdf](http://www.iconn.org/documents/GML07508_Kids_InfoBits_Bookmark_for_iCON.pdf)
- Flyers (8.5 x 11) & Posters (11 x 17): <http://www.iconn.org/iConnFlyers.aspx>
- Tent Card: <http://www.iconn.org/ICONNTentCard.aspx>
- iCONN Logo: <http://www.iconn.org/ICONNLogo.aspx>

Samples of the above marketing materials are available upon request.

### **Statistics Report Content:**

Vendor MUST provide the following iCONN usage statistics for each database:

Monthly searches and page views:

- For each library
- For each library type (academic, K-12, public)
- Statewide (sum of all library searches and page views)

YTD searches and page views:

- For each library
- For each library type (academic, K-12, public)
- Statewide (sum of all library searches and page views)

List of institutions accessing each database during a user specified time frame, sorted by library type.

Vendor MUST provide the following iCONN usage statistics for each journal title:

YTD page views:

- Statewide (sum of all page views)

Vendor SHOULD provide the following iCONN usage statistics for each journal title:

- For each library type (academic, K-12, public)

### **Statistics Report Availability:**

Reports MUST be available online, on demand.

Reports MUST be available in download format (e.g. CVS).

**Statistics Standards Compliance:**

Vendor MUST support Counter COP 2 (<http://www.projectcounter.org>).

Vendor SHOULD support SUSHI (ANSI/NISO Z39.93-2007) (<http://www.niso.org/workrooms/sushi>)

**Statistics Report Access:**

Individual libraries MUST have access to usage reports for their institution.

iCONN staff MUST have access to usage reports for each library, for each library type, and statewide.

**8. PRICE AND PAYMENT**

**Copyright and royalty fees**

All copyright and royalty fees MUST be included in the product price.

**Group Discount**

Vendor fees for any proposed databases MUST reflect a substantial discount relative to what the total statewide cost would be if all authorized institutions were to subscribe individually to the same resources.

**Credits for Existing Customers**

Vendor MUST offer refunds to all Connecticut authorized institutions for unused portion of licenses for proposed databases (subscription overlap). The prorated refund SHOULD be either a direct financial refund to the library (not to the state) or credit towards another product, at the option of the library.

**Payment Schedule**

Vendor MUST agree to invoice the state for databases in two equal installments each year, one installment due in the first half of the year and one installment due in the second half of the year. The year is based on the State Library's fiscal year (July 1 – June 30).

**Price Increases**

Prices MUST not increase more than the CPI or 5%, whichever is less, at the start of each renewal term. The CPI rate used is the Bureau of Labor Statistics "All Urban Consumers - U.S. City Average – All Items" (the average rate for the most recent last 12 months available) given at <http://www.bls.gov/cpi/home.htm>