



CONTRACT RENEWAL LETTER

Date: March 27, 2023
Contract #: UCPJMU5782
Service: Library Physical Collection Services
Renewal Period: 6/1/2023 to 5/31/2024
Renewal #: 3 of 9 One-Year
Issued By: James Madison University
Dana Simmers, Buyer Senior
Ph: 540-568-5113
Fx: 540-568-7935
Contractor: Overton & Associates, LLC
Attn: William Overton
166 Dow Avenue
Mineola, NY 11501
Ph: 516-449-5495
Contract Administrator: Sarah Pritchard, Libraries & Educational Technologies

Description of Renewal Notice:

In accordance with the renewal provision of the original contract all terms, conditions, and specifications of the original contract remain the same during the contract renewal period, along with any modifications that have been incorporated up until this point. The contract pricing will increase by 3.8% in accordance with the "other services" category of the CPI-W. An updated pricing schedule is attached to this renewal.

All invoices shall be submitted within sixty days of contract renewal term expiration as well as for each subsequent contract renewal period. Any invoices submitted after the sixty day period will not be processed for payment.

Return one executed renewal notice to my attention within ten days.

Overton & Associates, LLC
By: [Signature]
William Overton
Name (print)
William Overton
Title
4/13/23
Date Signed

James Madison University
By: [Signature]
Dana Simmers, CUPO
Name (print)
Buyer Senior
Title
3-27-23
Date Signed

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Contractor: Overton & Associates, LLC
Renewal Period: 6/1/2023 – 5/31/2024
Commodity: Library Physical Collection Services

1. **Contract Pricing:** Pricing is for on-demand library physical collection projects. At the University’s discretion, quotes for one or more projects will be requested of the Contractor and a timeline mutually agreed upon. The University will issue a purchase order to confirm authorization for the commencement of work in accordance with the quote. **No work shall be completed by the Contractor without a purchase order.**

Services	Cost
<p>A. Physical Collection Measurement Project-</p> <p>i. Measurement of Collection at Six (6) Locations:</p> <ul style="list-style-type: none"> • Carrier Library • Special Collections (<i>within Carrier</i>) • Offsite Storage • Rose Library • Education Library • Music Library <p>ii. Physical Measurement Process:</p> <ul style="list-style-type: none"> • Each major subclass shall be measured by the linear inch • Special Collections shall be measured as follows: <ul style="list-style-type: none"> ○ Books- by the linear inch ○ Document (<i>manuscript boxes</i>)- by the linear inch ○ Banker Boxes (<i>1.2 cubic ft. box</i>)- quantified by the box ○ Flat Materials- measured by the shelf and depth <p>iii. Includes three (3) months of consulting services at the conclusion of the project pertaining to collection measurement and any related moving or mapping services (<i>e.g. video conference, telephone, email</i>)</p> <p>iv. Includes all travel, set up, and miscellaneous cost</p> <p>v. Deliverable:</p> <ul style="list-style-type: none"> • All Collection Measure Data shall be provided to the University in .txt, .csv, or .xlsx format (<i>at the University’s request</i>), which shall be the property of the University. 	<p>\$10,120.50</p>
<p>B. Offsite Moving Project-</p> <p>i. Supply all project management, labor, travel, onsite expenses, supervision, set up, equipment, and training to relocate 36,076</p>	<p>\$25,950.00</p>

<p>volumes of offsite collection</p> <p>ii. Does not include shelving moves</p>	
<p>C. Inventory Project (s)- All Inventory project pricing shall include all project management, labor, travel, onsite expenses, supervision, training, and specific workflows including: <u>Pre-Production-</u> Overton Onsite Project Manager (PM) creates a project plan in coordination with client that includes the estimated timeline, workflow, technician guidelines, quality assurance guidelines, communication plan, and other pertinent information. Final project plan shall be approved by the University. <u>Production-</u> Project work carried out in accordance with project plan. <u>Post- Production-</u> University approves successful completion of project. PM shall provide University with the final project report.</p> <p>Pricing includes maximum team size of one (1) onsite Project Manager (PM) and ten (10) onsite technicians. Should the University request a larger team size to accommodate expedited timelines, additional fees may be incurred.</p> <p>All pricing assumes the University will provide 1.5 book carts for each onsite technician when necessary. Contractor provided book carts may incur additional fees.</p> <p>i. Project Set-Up Fee- Each onsite inventory project will incur a project set-up fee. Multiple inventory projects completed at the same time shall incur only one (1) set-up fee.</p> <p>ii. Inventory Work-Includes scanning barcodes of each individual item within the collection into proprietary software, matching to client catalog metadata, and flagging of metadata mismatches/items without barcodes for University resolution (<i>Contractor resolution incurs additional fee</i>). Contractor re-shelving after issue resolution incurs additional per unit shelving charge. Multiple location inventory projects may have lower rates applied.</p> <p>iii. Inventory Record Resolution- editing of records within University catalog to resolve mismatch/items without barcode</p> <p>iv. Inventory Record Searching & Barcoding/Linking- searching through client catalog records to resolve non-matching issue.</p> <p>v. Brief Bibliographic Record Creation- includes minimal record elements necessary to identify and locate an item (<i>i.e. LCCN, ISBN, call number, author, title, edition statement, publication and series information</i>)</p>	<p>\$18,165.00</p> <p>\$0.165/ item</p> <p>\$1.700/ item</p> <p>\$1.700/ item</p> <p>\$4.251/ item</p>



<p>vi. Shelving/Interfiling—shelving/interfiling according to University shelf list order.</p>	<p>\$0.510/ item</p>
<p>D. Consulting Services</p> <p>i. Remote Consulting Services- occur on an annual basis and can begin at any time during the contract with the issuance of a purchase order. The annual rate includes unlimited virtual meetings, emails, and phone conferences</p> <p>ii. Onsite Consulting Services- Scheduling of onsite consulting will be mutually determined</p> <p>Onsite Consulting Fee</p> <p>Onsite Transportation Fee</p> <p>Onsite Accommodation Fee- includes all meals and incidentals</p>	<p>\$1,038.00/year</p> <p>\$778.50/day</p> <p>\$674.70/visit</p> <p>\$259.50/overnight</p>
<p>E. Moving Services- includes all labor, supervision, project management, trucks, equipment, pre-move labeling, travel, and miscellaneous cost for shelf-to-shelf move with no segregation or integration</p> <p>i. External Move</p> <ul style="list-style-type: none"> • Building to Building • Assumes at least 30,000 LF * <p>ii. Internal Move</p> <ul style="list-style-type: none"> • Assumes at least 30,000 LF * <p>* For moves under 30,000 LF and additional setup will apply in addition to the per linear foot charges</p> <p>iii. Internal Dismantle, Move, & Reassemble Shelving</p> <p>iv. External Dismantle, Move, & Reassemble Shelving</p>	<p>\$3.37/ linear foot</p> <p>\$2.60/ linear foot</p> <p>\$6,228.00/ per move under 30,000 LF</p> <p>\$129.75/ per DF/LF</p> <p>\$140.13/ per DF/LF</p>
<p>F. Additional Services- includes all labor, supervision, project management, trucks, equipment, travel and miscellaneous cost</p> <p>i. Segregating Books- includes Contractor working off a picklist, scanning correct items and placing in a crate, and verifying final picklist</p>	<p>\$.67/ item</p>

Setup Fee (multiple projects completed at the same time shall incur only one (1) set-up fee)	\$5,190.00
ii. RFID Services- Contactor will apply and encode RFID tags to each item in the collection following guidelines as set in the project profile. RFID tags are not included and must be procured by the University from an RFID tag manufacturer. Price does not include the rental of RFID encoding workstations, which are necessary for RFID tagging	\$.31/ item
Setup Fee (multiple projects completed at the same time shall incur only one (1) set-up fee)	\$15,570.00
iii. RFID Workstation Rental- RFID encoding workstations do not include an RFID antenna, encoding pad or encoding software, which must be provided by the client or their RFID vendor	\$778.50/ workstation per project

2. The Contractor shall be responsible for all costs related to hiring and training local labor resources.