

RFP# 2024-001: askON Service Review

Ontario Colleges Library Service (OCLS)

INTRODUCTION

Ontario Colleges Library Service

The Ontario Colleges Library Service (OCLS) is a non-profit corporation that provides a suite of services to the libraries and learning resource centres of Ontario's 24 publicly funded Colleges of Applied Arts and Technology.

Project Background and Goals

[askON](#) is a virtual reference service offered at 12 Ontario colleges and centrally administered by OCLS. Collaboratively staffed by operators from the 12 participating college libraries as well as student volunteers, askON provides real-time chat and text-based online assistance to college library users, including research guidance, online resource help, and information on other college library services.

Since askON was launched in 2008, several shifts have occurred in the landscape:

- Technological advances, including widespread screen sharing, video conferencing, and AI capabilities.
- A rise in college-wide chat services (i.e., one-stop shop for all user questions filtered through a single online entry point on a college's website).
- Ongoing library staffing challenges, including turnover and competing service priorities.
- Changing user/student expectations for online service delivery.

To ensure that askON continues to meet the needs of the college libraries, OCLS is planning a service review for spring/summer 2024.

The goals of the service review are to:

- Gather information on other virtual reference services delivered collaboratively and/or in post-secondary environments, identifying best practices and/or innovation that could be implemented at OCLS.
- Consult with various stakeholder groups (e.g. through surveys and interviews) about the current askON service and identify possible areas for change or improvement. Stakeholder groups include OCLS staff, askON Steering Committee members, library leadership from participating and non-participating askON colleges, askON site coordinators and college operators, student volunteers, and end users.

- In a clear and concise report, summarize findings and make recommendations to strengthen the value and sustainability of the service in line with college needs and priorities. Recommendations could relate to technology, service participation models, staffing strategies, or training and mentoring strategies, among others.

SCOPE OF WORK

Deliverables	Key Activities
Deliverable 1: Project plan and timeline	Develop detailed project plan and timeline for undertaking deliverables. Deliver plan to working group. Revise as needed based on feedback.
Deliverable 2: Communication plan and copy	Develop a stakeholder communication plan and proposed messaging to communicate purpose and objectives of review and plan/timelines for stakeholder consultations. Deliver plan and draft communications to working group. Revise as needed based on feedback.
Deliverable 3: Environmental scan of virtual reference issues, trends, and best practices.	Explore relevant literature on virtual reference services in academic library and/or collaboratively delivered settings, identifying key issues, trends, opportunities, and best practices. Consult with other North American consortia offering collaborative virtual reference services. Share report with working group summarizing findings on key issues, trends, and best practices for virtual reference services.
Deliverable 4: Consult with stakeholder groups (e.g. through interviews, focus groups, and/or surveys)	Draft stakeholder consultation plan, including details on approaches, instruments, and questions to support data gathering, and deliver to working group. Finalize consultation plan based on feedback from working group. Undertake consultations Share results with working group.
Deliverable 5: Preliminary report and recommendations	Draft preliminary report, including findings and recommendations based on deliverables 3 and 4. Recommendations should include both short-term and long-term measures (e.g. implementable within a 1-year timeframe and implementable within 1-3 years) and comment on implementation strategies. Deliver preliminary report to the working group.

Deliverable 6: Final report and recommendations	Based on feedback from the working group, create final report and recommendations. Submit final report and recommendations to working group. Deliver presentation on key findings and recommendations to askON Steering Committee.
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Timeline

Date	Event
April 8, 2024	Project details and invitation released
April 17, 2024	Notice of intent to respond due
April 29, 2024, 5:00 p.m.	Submissions are due
Mid-May 2024	Selection of a successful proponent
Late May 2024	Start of work
June 7, 2024	Deliverable 1: A detailed project plan and timeline to achieve the project goals and meet the desired scope.
June 21, 2024	Deliverable 2: A stakeholder communication plan and accompanying copy to communicate purpose and objectives of review and plan/timelines for stakeholder consultation.
July 8, 2024	Deliverable 3: An environmental scan of virtual reference services in a collaborative and/or academic library context, including trends, issues, and best practices.
June-August 2024	Deliverable 4: Stakeholder consultation plan, execution, and results identifying needs and priorities.
September 13, 2024	Deliverable 5: Draft report, including recommendations based on environmental scan and stakeholder consultation findings.
Mid-October 2024	Deliverable 6: Final report and presentation, incorporating any requests or changes from OCLS or working group members.
October 2024	Final sign-off and end of project

Dates subsequent to the proposals being submitted are estimates only and are subject to modification without notice to applicants. All deliverables will be considered finalized upon their approval by the askON Service Review Working Group and OCLS.

APPLICATION PROCESS

OCLS is seeking proposals from qualified consultants with the following skills and experience:

- Knowledge or experience with post-secondary libraries, virtual reference services, and/or consortial services.
- Experience conducting research, including developing and conducting surveys and interviews, conducting environmental scans and literature reviews, etc.
- Ability to synthesize information in a clear and concise manner.
- Excellent written and verbal communication and interpersonal skills
- Excellent project management skills.

Application format

All responses must include the following elements:

- A resume and cover letter highlighting related experience and qualifications.
- Names and contact information for three references for whom similar work has been completed.
- A short proposal (no more than 4 pages), outlining approach and timelines for completing project deliverables.
- Cost proposal:
 - To complete deliverables as identified above.
 - Detail any other additional costs.

Applications are subject to the Freedom of Information and Protection of Privacy Act. Any information that the applicant regards as confidential must be in a separate appendix that is labelled as confidential. OCLS shall endeavour to honour such confidential designations to the extent allowed under the appropriate legislation.

Subcontractors

Applicants must clearly identify any and all subcontractors that they intend to use in supplying services to meet the obligations of the RFP. Applicants are responsible for all work performed by subcontractors.

Budget

The budget for this project is up to \$20,000 CAD. All proposals should clearly demonstrate their value proposition and provide a detailed breakdown of proposed project costs against outlined deliverables. Proposals that are significantly outside the budget should clearly identify why.

Proposal evaluation

Proposals will be evaluated using the following criteria:

- Articulation of a project plan with clearly identified approaches or methodologies and timelines for completing deliverables
- Budget with accompanying details and cost breakdown to complete all deliverables
- Demonstrated experience and qualifications managing projects, conducting research, facilitating stakeholder consultations, and preparing reports and presentations

- Demonstrated knowledge of the post-secondary library and/or library and information sector
- References

Application deadline

Proposals are due April 29, 2024, at 5:00 p.m. Notice of intent to respond requested by April 17, 2024. Please submit proposals, including detailed price quotations, to applications@ocls.ca, quoting '**RFP# 2024-001: askON Service Review**' in the subject line.

Questions can be submitted via email to Jana Purmalis (jpurmalis@ocls.ca); responses to questions will be provided to all parties who have submitted their intent to apply. OCLS reserves the right to seek clarification on any proposal submitted by a proponent to assist in making its evaluation, without notifying any other proponent of such. OCLS reserves the right to not award the contract.