RFQ: Consultant for Consortial eResources Management Services Review
Ontario Colleges Library Service (OCLS)

INTRODUCTION
Ontario Colleges Library Service
The Ontario Colleges Library Service (OCLS) is a non-profit organization 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
Since its inception in 2009, OCLS has provided management of electronic resources such as databases, journals, ebooks, streaming video, and other digital content to Ontario's college libraries. On behalf of the college libraries, the eResources Management service team negotiates licensing terms and pricing with vendors, arranges trials for new resources, facilitates subscription renewals and cancellations, processes invoices and payment, and provides troubleshooting and general support. By working centrally on behalf of the college libraries, OCLS is able to leverage the consortium's purchasing power for discounted pricing and improved licensing terms and conditions, while also providing additional cost savings and cost avoidance by reducing duplication of efforts.

To ensure that it continues to meet the needs of the college libraries, OCLS has developed a project to review the eResources Management service. The project goals are to:

- align OCLS's eResources Management service with the needs and priorities of the Ontario college libraries;
- review existing responsibilities, procedures, and workflows, and identify opportunities for improvements and streamlining;
- ensure that the resources allocated to the operation of the service are adequate and sustainable;
- explore the potential expansion of the service to products other than digital content (such as library tools, systems, etc.).

The project will:

- consult with college libraries about the current eResources service and gather ideas for improving or enhancing the service;
- document and analyze the current service responsibilities, procedures, and workflows to:
    - identify possible areas for change, improvement, or efficiencies;
    - accommodate HLLR's request to expand the eResources Management service to include the products currently managed under OCLS's Federated Search opt-in service and other tools;

- gather information on other consortia's eresource licensing services, looking for best practices and/or innovation that could be implemented at OCLS;
- develop a revised eResources Management Service Level Agreement between OCLS and the college libraries.

Invitation to bid

OCLS is seeking quotations and proposals from qualified consultants to:

- explore and review the existing OCLS eResources Management service and identify areas needing improvement or restructuring;
- conduct surveys and interviews with Ontario college library staff and HLLR to understand their current satisfaction and engagement with the service, and to determine their needs and priorities for the service;
- undertake an environmental scan of consortial best practices for eresources licensing services, including interviews, surveys, literature review, etc.;
- synthesize the above research into a clear and concise report and set of recommendations for reshaping the OCLS eResources Management Service.

SCOPE OF WORK

Deliverables	Key Activities
Deliverable 1: Project plan and timeline	- Develop detailed project plan and timeline for undertaking deliverables. - Deliver plan to project lead and steering committee. - Revise as needed based on feedback.
Deliverable 2: Review OCLS's current eResources service and interview eResources Team	- Review and analyze the documented responsibilities, procedures, and workflows that make up the current eResources Management service. - Identifying areas that work well and areas needing improvements or restructuring. - Interview OCLS's eResources team to identify areas that could be improved, revised, or enhanced.
Deliverable 3: Conduct interviews and surveys with college library staff and HLLR members	- Draft survey and interview questions and deliver to project lead and steering committee. - Finalize survey and interview questions. - Develop and distribute survey. - Conduct phone interviews with a selection of college library staff.
Deliverable 4: Environmental scan	Develop a survey for distribution to library consortia.

of consortial eresources best practices, including surveys and interviews.	• Based on survey responses, conduct selective phone or email follow-up interviews with other consortia. • Explore any literature (if available) on consortial licensing services best practices. • Review any eresources licensing service documentation available from other consortia.
Deliverable 5: Preliminary report and recommendations	• Draft preliminary report and recommendations based on deliverables 2, 3, and 4. • Deliver preliminary report to the project lead and steering committee.
Deliverable 6: Final report and recommendations	• Based on feedback from project lead and steering committee, create final report and recommendations. • Submit final report and recommendations to project lead and steering committee.

All deliverables will be considered finalized upon their approval by the eResources Service Review Project Steering Committee and OCLS.

Timeline

Activity/Task	To be completed by
Quotes due	October 13, 2017
Selection of a successful proponent	October 23, 2017
Start of work	October 30, 2017
Deliverable 1: Project plan and timeline	November 6, 2017
Deliverable 2: Review OCLS's current eResources service and interview eResources Team	November 20, 2017
Deliverable 3: Conduct interviews and surveys with college library staff and HLLR members	January 26, 2017
Deliverable 4: Environmental scan of consortial eresources best practices, including surveys and interviews.	January 26, 2017
Deliverable 5: Preliminary report and recommendations	February 5, 2017
Deliverable 6: Final report and recommendations	March 2, 2017
Final sign-off and end of project	March 31, 2017

GENERAL REQUIREMENTS

Quotations and proposals will be reviewed on the basis of their experience with related work, pricing, general quality and completeness, and stated and verified ability to complete the stated deliverables within the project timeline.

Specialized Knowledge and Required Skills

The following competencies are expected from successful proponents:

- Experience conducting research, including developing and conducting surveys and interviews, conducting environmental scans and literature reviews, etc.;
- Ability to synthesize knowledge in a clear and concise manner;
- Excellent written and verbal communications and interpersonal skills;
- Knowledge or experience with academic libraries, electronic resource workflows, and/or consortial services/environments are desired;
- Candidates with a Master's degree in library/information studies (MLS/MLIS or equivalent) and/or equivalent experience are desired.

APPLICATION PROCESS

Interested and qualified candidates may apply by submitting a proposal including:

- a resume and cover letter, highlighting related experience and qualifications;
- a short proposal (no more than 2 pages), outlining approach and methodology for completing project deliverables;
- a quotation with details and itemized pricing as appropriate;
- confirmed timeline to complete all deliverables.

Please submit proposals and quotations to applications@ocls.ca quoting "**RFQ: Consultant for Consortial eResources Management Services Review**" in the subject line. Questions can be submitted via email to Coralee Leroux, cleroux@ocls.ca.

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.

Proposal Deadline
October 13, 2017