



**Date: August 21, 2013**

## **Ontario Colleges eBook Consortium Project Initiative Request for Information (RFI)**

**Project Sponsored by:  
Heads of Libraries and Learning Resources (HLLR)  
Colleges Ontario**

**Project Managed by:  
Ontario Colleges Library Service (OCLS)**

Ontario Colleges eBook Initiative  
Request for Information (RFI)

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# Ontario Colleges eBook Initiative Request for Information (RFI)

## 1. Introduction

Ontario's 24 publicly funded Colleges are seeking a solution to their eBook management requirements and have embarked upon a project to analyze the potential value and efficiencies associated with establishing a Colleges eBook Consortium. The Colleges have different specialties and much of the eBook material they require is not available in aggregated bundles.

Ontario's Colleges, as represented by the College Heads of Libraries and Learning Resources (HLLR) are looking for the complete eBook ecology – acquisition, hosting, cataloguing and easy access through discovery tools and library catalogues. This Request for Information is intended to help the College libraries achieve their overall vision of a scalable, bilingual e-resources management solution, while seeking that perfect match with market realities, capabilities and technology.

The Colleges will be pleased to receive responses from vendors and potential public sector partners who feel they can provide all or part of the ecology that is described in this Request for Information.

## 2. Project Background

In fall of 2010 the College Heads of Libraries and Learning Resources created an eBook Research Panel and tasked them with developing a study to explore the opportunities and challenges presented to College libraries by eBooks and to provide a clearer picture of the digital landscape. The results of the study, tabled in May 2011, presented information on the eBook landscape, outlining experiences from thought leaders, vendors, aggregators, publishers, librarians, consortia and College store owners or associations across Canada, North America and the United Kingdom. Consortia or individual Colleges engaging in or planning to engage in eBook purchasing in Canada, the USA and the UK were consulted for their insight and practices. One of the recommendations from this study was the piloting of a College-wide eBook consortium.

To move forward with this recommendation, funding was sought and obtained, and the project is now in the Analysis Phase. The purpose of this Phase is to assess best practices for collective eBook procurement, licensing and access, identify the IT infrastructure necessary for effective, College-wide use of eBooks and reveal important information about the impact of eBooks on College library budgets, operations and services. Supported by HLLR, all 24 College Presidents, the Ministry of Training Colleges and Universities and Colleges Ontario the project presents a significant opportunity for the College libraries to take a leadership role in identifying the cost-savings and efficiencies possible through collaborative purchasing and management of eBooks while exploring how best to offer equal, universal access to the students and faculty of all 24 Colleges regardless of demographics or location.

In short, this Phase is laying the foundation for the development of a sustainable, integrated and cost-effective operation of an Ontario wide, Colleges eBook Consortium.

The sponsoring body for this project is the Heads of Libraries & Learning Resources. HLLR is comprised of the directors (or designate) of libraries / learning resources (College libraries) of each of Ontario's 24 publicly funded Colleges, and serves as an Advisory Group to OCLS.

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The Project Management body for this project is Ontario Colleges Library Service (OCLS). OCLS was established in 2009 as a non-profit corporation to provide a suite of core and opt-in services to the libraries and learning resources/learning commons (College libraries) of Ontario's 24 publicly-funded Colleges of applied arts and technology, including two French language Colleges.

### **3. Instructions for Responding to this RFI**

#### **3.1 RFI Process**

In order to move forward, the Colleges are seeking organizations or vendors who provide existing technology/services that can meet HLLR's requirements or who feel they can quickly provide such technology or solutions. The information gathered from your organization through this RFI will be used as part of the Colleges eBook Consortium analysis phase and will help to understand the capability of the marketplace and the possibilities available that will contribute to fulfilling their needs in managing e-resources.

This RFI will result in a report that will be sent to the HLLR eBook Project Business Model/ Vendor Task Force in the fall of 2013. The report will include recommendations, based on the responses, and the recommendation(s) may play a role in determining the scope of any future eBook RFP and the functionality that will be required. No company or specific product will be identified in any public report. A vendor's chance at becoming a successful proponent in any future opportunity is not influenced by their response to this RFI.

The information gathered about companies and services at this stage will remain confidential, and members of the evaluation team have signed non-disclosure agreements.

When fully operational, this project is intended to provide interaction with publishers and distributors, including organizations having their own Digital Asset Management (DAM) systems that may choose to keep acquired material in their DAM and to control access to the Colleges.

The solutions proposed must have the ability to adapt to changes in the market and technology and must demonstrate an ability to handle much higher levels of future activity.

HLLR is hopeful that this RFI offers vendors and/or potential partners with the opportunity to look at the Colleges' aspirations and to contribute their thoughts. The Colleges have the option of building the necessary infrastructure that is envisaged but, if possible, would prefer to work with partners whose core businesses are aligned with each other and with their vision.

It is possible that this process will introduce new business practices, new standards and new technologies to Ontario's Colleges. To this end, HLLR is not assuming the continuation of existing business models. Instead, they are open to hear innovative funding and pricing models and suggestions.

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**3.2 Intent to Respond**

An indication of the intention to respond to this Request for Information is requested from organizations or vendors. Please send a confirmation of your intent to submit a response by e-mail by August 29, 2013, as noted below in the Schedule. Please include the name, title, e-mail address and contact information for the organization's representative with whom we will communicate, and send to:

Attention: Doris Rankin  
Library and Information Consultant  
Email: rankin@storm.ca  
Phone: 613-624-5580

**3.3 RFI Response Submission**

Two print copies, one with original signature, are to be submitted in writing and sent via courier (with signature required) or delivered in person to:

Ontario Colleges Library Service  
74 Gervais Drive  
Toronto, ON M3C 1Z3

Attention: Thomas Guignard  
eBook Project Manager

Print copies of the submission are the authority.

To help with the selection process, a complete electronic copy of the submission is required by email and should be sent to:

Attention: Doris Rankin  
Library and Information Consultant  
3170 County Rd. 29  
Pakenham, ON K0A 2X0

Email: rankin@storm.ca  
Phone: 613-624-5580

Responses are to be received on or before: **September 24, 2013 at 3:00 PM**

Submissions received on or before the deadline noted above will be opened at 3:00 EST on September 24, 2013. Responses received after this date/time will be returned unopened and will not be reviewed.

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**3.4 Schedule**

| <b>ACTION</b>   | <b>DATE</b>         |
|---|---------------------|
| Distribution of RFI to MERX and Vendors   | August 21, 2013     |
| Intent to Respond deadline  | August 29, 2013     |
| Last date for Vendor queries  | September 4, 2013   |
| Date for responses to Vendor queries  | September 12, 2013  |
| Receive RFI responses from Vendors  | September 24, 2013  |
| RFI results analyzed  | October 3, 2013     |
| Additional follow-up questions and possible presentations and/or demonstrations | October 3, 2013     |
| Results provided to HLLR by Consultants   | Early October, 2013 |

**3.5 Questions**

Questions about the contents of this document may be submitted by email up to September 4, 2013 to:

Attention: Doris Rankin  
Library and Information Consultant  
Email: rankin@storm.ca  
Phone: 613-624-5580

Queries will be acknowledged via e-mail only within four business days.

A copy of all queries received by the deadline and responses to those queries will be posted publicly on MERX as numbered updates to the RFI document, and sent to all Vendors that have confirmed their intent to respond to the RFI. Vendors must acknowledge receipt of all updates in their responses. The Consultant will respond to the queries on September 12, 2013.

Vendors may not communicate in any manner with any staff at OCLS or any of the publicly funded Ontario College Libraries. Communication must follow the process defined above and conducted only with Doris Rankin or her associate, Ken Roberts.

**4. Contents of RFI Response**

**4.1 Requirements**

All responses must include the forms and tables provided in this RFI. These include *Appendix A: Ontario Colleges eBooks RFI General Form* and, if appropriate, *Appendix B: Availability of Materials* and specific functionality tables that relate to each module for which a solution is proposed.

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**4.2 Company Profile and Credentials**

Responding vendors should provide a brief profile of the company demonstrating relevant credentials to provide products and/or solutions for the Ontario Colleges HLLR eBook Consortium project. This information should be provided in *Appendix A: Company Profile and Credentials*

**4.3 Project Experience and References**

Responding vendors should provide information on related experience guiding libraries in implementing their eBook solution and/or elements of the various requirements.

Responding vendors should provide two references using comparable products or solutions (preferably for the projects stated above). Contact information, including e-mail address for each of the two references should be provided. This information should be provided in *Appendix A: Similar Project Experience and References*.

**4.4 Response to College's Vision Statements (Section 6.1)**

Responding vendors should provide an in-kind response to the Colleges' Vision Statements, found in Section 6.1, that will correspond to their eBook technology and solutions and how their solutions, capabilities, and partnerships will help the Colleges achieve their vision. Vendor's responses should demonstrate an understanding of the Ontario Colleges environment; the Colleges' need for flexibility and knowledge of various program offerings at each College. Statements and solutions put forth in the response should be supported by evidence of current usage of solution by vendor's clientele; existing partnerships, work on similar projects, details in the requirements sections 7-10 of this RFI, etc. Response to the College's Vision Statements and what is offered should not exceed five pages in length in the form provided in *Appendix A: Vendor response to Vision Statements*.

**4.5 Pricing and/or Business Models**

Responding vendors should provide a description of Pricing and/or Business models used for similar project components that fit the needs and requirements of Colleges as found in this RFI and that work for small and medium sized Colleges as well as larger Colleges, as appropriate. This information should be provided in *Appendix A: Vendor Pricing and/or Business Models*.

**4.6 Availability of Materials**

Responding vendors should provide an indication of their ability to assist in the acquisition and hosting of content in the key program subject areas offered by Ontario Colleges as seen in *Appendix B: Ontario Colleges Common Programs*. Vendors should understand that Colleges acquire materials from various sources such as individual publishers, distributors, aggregators, trade associations, government agencies, etc. The vision that these materials can be hosted in one catalogue/repository/platform requires that the proposed solution be fully and widely open for providing access. If appropriate, vendors that provide content should indicate - within the *Appendix B* form - what materials they can provide, within relevant subject areas.

## 5. Evaluation Criteria

The evaluation will be conducted by a review team guided by the approved evaluation criteria listed below which is based on the Colleges' eBook project vision and other important requirements for the solution.

Following the deadline, the review team may have further questions and may request additional written information, and/or a presentation or a demonstration. Responses to this RFI are considered confidential, and will not be shared beyond the evaluating team.

Each respondent is entitled to a personalized response to their submission if requested. Such a request must be made, in writing, via email within 30 days of the final RFI submission date to:

Attention: Doris Rankin  
Library and Information Consultant  
Email: rankin@storm.ca

### **Vendor proposals will be evaluated based on:**

- Demonstrated ability to help meet the Colleges' Vision Statements listed in Section 6.1.
- Ability to help create a complete eBook ecology (open to cooperate with other vendors or service providers as needed, to deliver a seamless, end-to-end, eBook service).
- Experience and record of success with projects of similar scope and intent.
- Flexibility, scalability and demonstrated ability to adjust to technological and market pressures.
- Pricing and/or Business models used for similar project components that fit the needs and requirements of Colleges of all sizes and with varied program offerings.
- Simplicity/completeness and creativity of the solution(s) being proposed.
- Enhanced accessibility features such as adherence to any relevant legislation, such as Accessibility for Ontarians with Disabilities Act (AODA); Canadian Copyright Law; both Canadian and Ontario privacy legislation, and; English and French interfaces for both public and staff.

The Evaluation Criteria and associated weighting is listed in *Appendix E: Evaluation Criteria*.



## 6. Statement of Requirements

### 6.1 Vision Statements

**We will know the Colleges eBook Consortium project is successful:**

1. When College libraries can act as consortium where it makes sense (assumed to be, but not limited to, common needs such as the provision of core material that supports shared curriculum or the provision of a single hosting platform or cataloguing and processing, etc.), and
2. When College libraries can act individually where it makes sense (assumed to be, but not limited to, the purchase of material to meet individual College needs), and
3. When College libraries can select and acquire eBooks that are relevant to their programs using multiple vendors of their choosing without limitations imposed by hosting contracts or technological barriers, and
4. When the eBooks to which each College has rights are attached to catalogue records that are as robust as those attached to print books, and as easily loaded, without significant intervention, into library catalogues and other discovery tools, and
5. When eBook holdings are presented on a single Discovery Layer at each College which seamlessly permits students and faculty to find all resources and to borrow and download eBook and other electronic content, without the appearance of leaving the library's site, and
6. When downloading eBooks on any device is simple, with minimal time spent verifying user rights or setting up special software for different devices or readers, and
7. When the Colleges are able to experience cost efficiencies and savings in their cost of operating, including but not limited to purchasing, processing, downloading and staffing and can calculate the added value of services to funding bodies.
8. When eBook conditions of use (DRM) are easy for students and faculty to understand and are as consistent as possible for all material, and
9. When eBooks help Colleges address accessibility issues, specifically, but not limited, to Accessibility for Ontarians with Disabilities Act (AODA); Canadian Copyright Law; both Canadian and Ontario privacy legislation, and; English and French interfaces for public and staff, and
10. When eBook solutions allow the Colleges to retain maximum flexibility to address future needs, and

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11. When Ontario College libraries are making the best possible use of hybrid eBook models, including:
- a) Use of ownership, licensing and leasing models when appropriate, and
  - b) Use of downloading, streaming and partial downloading models when appropriate, and
  - c) Use of ePub, PDF, HTML5 and other formats when appropriate.

The vision expressed in this section trumps all insistence on specific technologies or methodologies. The Colleges understand that the vision is broad in scope and that it likely cannot be reached in one phase. They are looking for solutions that help them get as close as possible to this vision without harming, in any way, their path toward achieving their Vision.

## 7. General Information on the Modules of eBook Ecosystem

### 7.1 Acquisitions Module

All College libraries require some general eBook material such as those offered through aggregated bundles. In addition to this content, each College needs to select and acquire specialized material from a wide variety of publishers. The program offerings of Ontario's Colleges are specialized and sometimes relate to trades and the acquiring of professional licenses. eBook content of interest to Colleges are often offered by small, specialized publishers and are not aggregated. A list of Ontario College programs can be found on pages 20-35 of the College's handbook <http://www.ocas.ca/Documents/oc-handbook-eng.pdf> and a more generalized list in *Appendix B: Ontario Colleges Common Programs*. These lists provide an indication of the range of material the College libraries need to acquire.

The Ontario College libraries and learning resources/learning commons (LLRs) are seeking a robust, stable and scalable acquisitions solution that allows them to acquire content from many sources, some of which are outside of the mainstream publishing world. As an example, various trades offer handbooks, workbooks and other valuable publications through their professional associations. The response table for the Acquisitions Module can be found at Section 8, below.

### 7.2 Content Host Module

HLLR believes that eBooks purchased for College libraries should be hosted by a single site whenever practical. This will make it easier for Colleges to share material acquired through their consortium, to view the holdings of each College and to be seamlessly integrated with other processes in the desired eBook ecosystem. The Colleges are seeking a solution that will give publishers confidence that their material is protected and that their material is only used as permitted by the terms of acquisition and licensing.

The Colleges are looking for a robust, stable and scalable Content Host that integrates well with the other functionality they require. The response table for the Content Host Module can be found at Section 9, below.

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### **7.3 Discovery Module**

While Ontario's Colleges currently enable access to some eBook material, the majority of this material is held in licensed databases. A list of databases shared by all Colleges is included in *Appendix C: General Information on College Libraries*. Many of the Colleges use one of three products that provide functionality found in Discovery Layer catalogues. The three products are Serials Solutions' Summon Discovery Service, Serials Solutions' 360 Core, and Ebsco Discovery Service (EDS).

Through this RFI, the Colleges are trying to determine their best path to offering students and faculty at each College with a unified catalogue that displays all print and eBook offerings and provides an easy way of borrowing or – when required by DRM – placing holds on eBooks that are found. It is assumed that it is the discovery layer that brings material and users together and creates a simple experience that quickly leads users to the material they want and then provides them with access to that material.

The Colleges are looking for a robust, stable and scalable discovery solution that integrates well with the other functionality they require. The response table for the Discovery Module can be found at Section 10, below.

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| <b>8. Acquisitions Module</b>  |                 |
|--|-----------------|
| <b>Functionality</b>   | <b>Response</b> |
| 1. Allows each College to maintain its own accounts and sub-accounts and to track its selections and expenditures:   |                 |
| 2. Allows a College consortium to administer its own account and sub-accounts and to track its selections and expenditures:                                  |                 |
| 3. Allows multiple selectors, within an account, to work concurrently:   |                 |
| 4. Allows for prices to be displayed in Canadian currency:   |                 |
| 5. Allows selectors to maintain and to save and transmit work lists of desired titles before submitting them for acquisition:                                |                 |
| 6. Maintains or allows for the creation of files containing vendor information and connects to publisher selection material, including formats such as ONIX: |                 |
| 7. Allows selectors to see what, if any, DRM and format restrictions are involved in each acquisition:   |                 |
| 8. Provides English and, ideally, French interfaces for staff:   |                 |
| 9. Allows for the creation, submission and tracking of electronic purchase orders.   |                 |
| 10. Allows for the payment of purchase orders, once all items have been received:  |                 |
| 11. Allows for partial receipt and partial payments of a purchase order  |                 |
| 12. Allows selectors to add publishers that may not be listed in the Acquisitions module:  |                 |
| 13. Meets all Accessibility for Ontarians with Disabilities Act (AODA) software requirements:  |                 |

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| <b>8. Acquisitions Module</b>  |                 |
|--|-----------------|
| <b>Functionality</b>   | <b>Response</b> |
| 14. Provides training and support and is available 24/7 with the exception of required maintenance:  |                 |
| 15. For vendors who are content providers, explain models you currently use that relate to:<br>a) subscription<br>b) purchase<br>c) re-purchase<br>d) leasing<br>e) renting<br>f) permanent archival acquisition<br>g) patron-driven acquisition<br>h) pay-per-view<br>i) vendor-selected packages<br>j) any variants of above.  |                 |
| 16. For vendors who are content providers, explain:<br>a) pricing issues, inter-loan impacts and any differences in use or pricing between institutional and consortia purchases.<br><br>b) for leasing, renting or other non-purchasing models, ways you attempt to ensure that, once available, titles continue to remain available.<br><br>For vendors responding to this section, you may include up to five pages of explanation. |                 |
| 17. Some functionality listed in this section may require interaction with the Discovery module, a Content Host and/or an ILS. Please indicate where responsibility for functionality resides in another module.   |                 |
| 18. The Vendor may include a one page Schema to indicate how their product or service will interact with other modules.  |                 |

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| <b>9. Content Hosting Module</b>  |                 |
|---|-----------------|
| <b>Functionality</b>  | <b>Response</b> |
| 1. Does not require user-identifiable data to authenticate or operates within the bounds of Canadian and Ontario protection of privacy laws:  |                 |
| 2. Allows each College to access eBook content from its own account(s):   |                 |
| 3. Allows a College consortium to access eBook content from its own account(s):   |                 |
| 4. Allows the Colleges to place acquired material from multiple sources onto the hosted site in an efficient and timely manner:   |                 |
| 5. Acts as a DAM for the content that is hosted: (Please describe any unique hosting features)  |                 |
| 6. Allows for portability of information and digital assets by libraries (i.e. libraries, not the vendor, control content and can move assets to another storage location if desired), subject to a notification period:            |                 |
| 7. Interacts with publishers of all sizes, including those with proprietary Digital Asset Management (DAM) systems. This means the service can work with publishers who store digital content and eBook files on their own servers: |                 |
| 8. Is capable of handling: <ul style="list-style-type: none"> <li>a) PDF</li> <li>b) EPUB</li> <li>c) Other relevant formats (name them):</li> </ul>  |                 |
| 9. Allows Colleges to upload digitized material to the content host in a timely manner. (Please list any restrictions or implications. For example, can College staff upload files themselves?):                                    |                 |
| 10. Can permit the hosting of media files:  |                 |

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| <b>9. Content Hosting Module</b>   |                 |
|--|-----------------|
| <b>Functionality</b>   | <b>Response</b> |
| 11. Provides for partial downloading (e.g. one or two chapters at a time) or for streaming:  |                 |
| 12. Is capable of managing and serving English and French bibliographic metadata subject to the Colleges own bibliographic standards:  |                 |
| 13. Manages and displays bibliographic data in both English and French that is significant to the Canadian market: Canadian contributor codes, BISAC regional codes:   |                 |
| 14. Has sufficient capacity to handle up to 100,000 titles and to handle up to 500,000 annual transactions – and is scalable:  |                 |
| 15. Provides an interface with publishers, distributors and digital management services to upload and manage content and to monitor use, including: <ul style="list-style-type: none"> <li>a) Ability to manage potential differences in pricing, licensing and purchase terms;</li> <li>b) Ability to batch upload titles;</li> <li>c) Ability to apply established terms for lending (DRM);</li> <li>d) Ability to upload individual titles;</li> <li>e) Ability to monitor use by title, creator and format:</li> </ul> |                 |
| 16. Passes the following information associated with each title to the discovery layer/ILS for display: <ul style="list-style-type: none"> <li>a) digital formats and file sizes;</li> <li>b) valid lending periods and restrictions;</li> <li>c) current availability;</li> <li>d) Holds information;</li> <li>e) Title/copy unique identifier;</li> <li>f) language of item</li> </ul>   |                 |
| 17. Passes, for each transaction, the following associated information to a  |                 |

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| <b>9. Content Hosting Module</b>   |                 |
|--|-----------------|
| <b>Functionality</b>   | <b>Response</b> |
| <p>discovery layer/ILS:</p> <ul style="list-style-type: none"> <li>a) direction download URL within the transaction record,</li> <li>b) digital format and file size,</li> <li>c) checkout date,</li> <li>d) expiry date,</li> <li>e) title/copy unique identifier:</li> </ul> |                 |
| <p>18. Works with the discovery layer and/or Acquisitions module to provide reports and alerts about when a College or consortium is about to lose access to a licensed or purchased item so that the item can be re-acquired:</p>   |                 |
| <p>19. Provides reports on use of each file:</p>   |                 |
| <p>20. Meets all Accessibility for Ontarians with Disabilities Act (AODA) software requirements:</p>   |                 |
| <p>21. Provides training and support and is available 24/7 with the exception of required maintenance:</p>   |                 |
| <p>22. Some functionality listed in this section may require interaction with the Acquisitions module, a Content Host and/or an ILS. Please indicate where responsibility for functionality resides in another module.</p>   |                 |
| <p>23. The Vendor may include a one page Schema to indicate how their product or service will interact with other modules.</p>   |                 |



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| <b>10. Discovery Module</b>   |                 |
|---|-----------------|
| <b>Functionality</b>  | <b>Response</b> |
| 1. Operates within the bounds of Canadian and Ontario protection of privacy laws. It is assumed that authentication is completed within the ILS and should use industry standards such as SIP2 and EZProxy:   |                 |
| 2. Provides or links to a simple sign-in mechanism, if necessary, that allows authorized users to experience the full capabilities of the Discovery Layer:  |                 |
| 3. Meets all Accessibility for Ontarians with Disabilities Act (AODA) software requirements:  |                 |
| 4. Unifies searches for all physical and electronic material held by the College. This functionality may not be currently available for some solutions but welcome responses that describe planned capabilities that meets the needs for simple, single search and discover capabilities: |                 |
| 5. Fully integrates digital content within the Discovery Layer and shares real-time availability and download data with the Content Host:   |                 |
| 6. Provides or links to user accounts that allow each user to track their current status for all items borrowed or placed on Hold:  |                 |
| 7. Provides a robust search capability that uses all available metadata and bibliographic data. Please describe what facets can be used to refine searches:   |                 |
| 8. Ability for users to save searches into personal accounts:   |                 |
| 9. Subject to rights, ability to preview title content without it counting as a loan transaction:   |                 |
| 10. Offers a solution that incorporates current Discovery Layer software used by some College libraries and/or offers a solution for moving Colleges to a software solution that none of the  |                 |

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| <b>10. Discovery Module</b>  |                 |
|--|-----------------|
| <b>Functionality</b>   | <b>Response</b> |
| Colleges currently offer.<br>If you are offering a hybrid solution, please describe any existing APIs with relevant College ILS and catalogue software:  |                 |
| 11. Allows authorized users to download and/or stream selected material without leaving the Discovery Layer. If this is not currently possible, describe the steps that users must take and then describe future plans that might simplify this process:   |                 |
| 12. Provides English and French for both public and staff interfaces. If French capabilities are not yet available, please describe any plans to provide this element. As you can see from <i>Appendix C: General Information on Ontario Colleges</i> , two Colleges offer programs for francophone Ontarians: |                 |
| 13. Provides users with an environment that is easy to use from multiple devices, including mobile devices (list compatible interfaces):   |                 |
| 14. eBooks are compatible with existing reading applications such as Bluefire, or apps are available via the Apple App store and the Android marketplace. We favor open content whenever possible.   |                 |
| 15. Provides training and support and is available 24/7 with the exception of required maintenance:  |                 |
| 16. Some functionality requires interaction with a Content Host and/or with an ILS. Please comment when this is the case – and indicate where responsibility for the functionality resides with another element of our ecology in your solution:   |                 |
| 17. The Vendor may include a one page Schema to indicate how their product or service will interact with other modules.  |                 |

**Appendix A: Ontario Colleges eBooks RFI General Information Form**

| Company Profile and Credentials  |  |
|--|--|
| Company name:  |  |
| Company address:   |  |
| Company website:   |  |
| Main products/services:  |  |
| Primary market/customers:  |  |
| Number of employees:   |  |
| Ownership (e.g. privately held, public):   |  |
| Description of products or services that are already delivered to customers today, and is comparable to what is requested in this RFI :  |  |
| Contact person responding to this RFI as well as the person's position or role:  |  |
| Telephone of Contact:  |  |
| E-mail of Contact:   |  |
| Signature of person with authority to attest to the responses given.   |  |
| Date   |  |
| Conflict of Interest   |  |
| If the box below is left blank, the Vendor will be deemed to declare that there was no Conflict of Interest in preparing its submission. |  |

| <b>Company Profile and Credentials</b>   |  |
|--|--|
| Otherwise, if the statement below applies, check the box.  |  |
| <input type="checkbox"/> The Vendor declares that there is an actual or potential Conflict of Interest relating to the preparation of its submission.<br>If the Vendor declares an actual or potential Conflict of Interest by marking the box above, the Vendor must set out details of the actual or potential Conflict of Interest: |  |
| <b>RFI Revisions</b>   |  |
| In order to ensure that all submissions are based on the same terms, Vendors should list all revisions or updates that they have received and whose terms are incorporated in their submissions.   |  |
| List RFI Revisions / Updates:  |  |

### **Appendix A: Similar Project Experience and References**

| <b>Requirement: Contact information, including e-mail addresses, should be provided for at least two customers using comparable products or services.</b> |           |
|---|-----------|
| <b>Response:</b>  |           |
| <b>1.</b>   | <b>2.</b> |

### **Appendix A: Vendor response to Vision Statements**

**Requirement: Vendors should provide an in-kind response to the Colleges' Vision Statements, found in Section 6.1, that will correspond to their eBook technology and solutions and how their solutions, capabilities, and partnerships will help the Colleges achieve their vision. Vendors are asked to keep their response to 5 pages or less.**

**Response:**

**Appendix A: Vendor Pricing and/or Business Model**

**Requirement: Responding vendors should provide a description of Pricing and/or Business models used for similar project components that fit the needs and requirements of Colleges as found in this RFI and that work for small and medium sized Colleges as well as larger Colleges, as appropriate.**

**Response:**

## Appendix B: Ontario Colleges Common Programs

### Availability of Materials

If appropriate, responding vendors should provide an indication of their ability to assist in the acquisition and hosting of content in the key program subject areas offered by Ontario Colleges. (Vendors are asked to be more specific than general, i.e. not providing lists of their stock of holdings.)

| PROGRAM SUBJECT  | RESPONSE |
|--|----------|
| <b>GENERAL</b>   |          |
| General Arts And Science                               |          |
| <b>COMMUNITY SERVICES</b>                              |          |
| Developmental Services                                 |          |
| Educational Services                                   |          |
| Firefighting   |          |
| Law, Justice and Policing                              |          |
| Recreation And Leisure                                 |          |
| Social / Community & Youth Services                    |          |
|  |          |
| <b>HEALTH SCIENCES</b>                                 |          |
| Dental Services  |          |
| Esthetics  |          |
| Fitness And Health Promotion                           |          |
| Nursing  |          |
| Occupational Therapy                                   |          |
| Paramedical Services                                   |          |
| Personal Support Services                              |          |
| Pharmacy   |          |
| Preparatory Health Sciences                            |          |
|  |          |
| <b>TECHNOLOGY</b>                                      |          |
| Architecture   |          |
| Chemical Engineering                                   |          |
| Civil Engineering                                      |          |
| Computer Engineering / Programming / Systems           |          |
| Electrical / Electronics                               |          |
| Environmental  |          |
| Heating, Refrigeration And Air Conditioning Technology |          |
| Internet Website Development                           |          |
| Mechanical / Engineering / Motive Power                |          |
| Pre-technology   |          |
| Renovation   |          |
| Welding  |          |
|  |          |

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|                                   |  |
|-----------------------------------|--|
| <b>BUSINESS</b>                   |  |
| Accounting                        |  |
| Business                          |  |
| Culinary Services                 |  |
| Human Resources Management        |  |
| International Business Management |  |
| Law Clerk                         |  |
| Marketing                         |  |
| Office Administration             |  |
| Personal Financial Services       |  |
| Project Management                |  |
| Tourism, Hospitality and Events   |  |
|                                   |  |
| <b>MEDIA &amp; DESIGN</b>         |  |
| Advertising                       |  |
| Broadcasting                      |  |
| Graphic Design / Art              |  |
| Public Relations                  |  |



## Appendix C: General Information about Ontario College Libraries

### Ontario Colleges – Main campus

| College               | Main Campus      |
|-----------------------|------------------|
| Algonquin College     | Ottawa           |
| Cambrian College      | Sudbury          |
| Canadore College      | North Bay        |
| Centennial College    | Toronto          |
| Collège Boréal        | Sudbury          |
| Conestoga College     | Kitchener        |
| Confederation College | Thunder Bay      |
| Durham College        | Oshawa           |
| Fanshawe College      | London           |
| Fleming College       | Peterborough     |
| George Brown College  | Toronto          |
| Georgian College      | Barrie           |
| Humber College        | Toronto          |
| La Cité collégiale    | Ottawa           |
| Lambton College       | Sarnia           |
| Loyalist College      | Belleville       |
| Mohawk College        | Hamilton         |
| Niagara College       | Welland          |
| Northern College      | Timmins          |
| St. Clair College     | Windsor          |
| St. Lawrence College  | Kingston         |
| Sault College         | Sault Ste. Marie |
| Seneca College        | Toronto          |
| Sheridan College      | Oakville         |

### Ontario Colleges Ebook Title or Package subscription

| eBook Title or Package subscription  | Subject Area        | Number of Subscriptions |
|--------------------------------------|---------------------|-------------------------|
| Gale Virtual Reference Library       | Liberal Studies     | 17                      |
| AccessScience                        | Trades & Technology | 15                      |
| CICA Standards and Guidance (Knotia) | Business            | 15                      |
| OVID eBooks                          | Nursing             | 15                      |
| Encyclopedia Britannica Online       | Reference           | 15                      |
| Canadian Electronic Library          | Liberal Studies     | 14                      |
| Card Online                          | Business            | 10                      |
| Oxford English Dictionary Online     | Reference           | 9                       |

Ontario Colleges eBook Initiative  
Request for Information (RFI)

| eBook Title or Package subscription                                  | Subject Area          | Number of Subscriptions |
|--|-----------------------|-------------------------|
| Scotts Online products   | Business              | 9                       |
| Canadian Directory to Foundations & Corporations                     | Business              | 8                       |
| Safari Tech Books  | Trades & Technology   | 8                       |
| EBSCO Academic Subscription Ebooks Collection                        | Liberal Studies       | 7                       |
| Credo Reference  | Liberal Studies       | 6                       |
| Ontario Building Code (Orderline)                                    | Trades & Technology   | 6                       |
| Canada Info Desk   | Liberal Studies       | 6                       |
| AccessEngineering  | Trades & Technology   | 5                       |
| Oxford Reference Online  | Reference             | 5                       |
| Ebsco Audio Book and Ebook Collection                                | Liberal Studies       | 5                       |
| EBSCO Community College Ebooks Collection                            | Liberal Studies       | 5                       |
| IEEE Xplore digital library  | Trades & Technology   | 4                       |
| Oxford Art Online  | Liberal Studies       | 4                       |
| Labour Spectrum - classic edition                                    | Law                   | 4                       |
| Books 24X7 (Proquest)  | Liberal Studies       | 3                       |
| CCH Online titles (CCH)  | Business              | 3                       |
| CRC Handbook of Chemistry & Physics (CRC Press - Taylor & Francis)   | Trades & Technology   | 3                       |
| Financial Reporting in Canada (Knotia)                               | Business              | 3                       |
| Grove Art Online   | Liberal Studies       | 3                       |
| PsycBooks  | Nursing               | 3                       |
| Safari (Whole)   | Trades & Technology   | 3                       |
| Weissman Online  | Hospitality / Tourism | 3                       |
| Associations Canada  | Business              | 2                       |
| ASTM Standards (IHS)   | Trades & Technology   | 2                       |
| Bibliothèque numérique canadienne française                          | Liberal Studies       | 2                       |
| Blue Book of Canadian Business                                       | Business              | 2                       |
| Contact Canada directories (Contact Canada)                          | Business              | 2                       |
| eLibrary (Proquest)  | Liberal Studies       | 2                       |
| Encyclopedia of Life Sciences (Wiley)                                | Reference             | 2                       |
| Encyclopedie Universalis   | Reference             | 2                       |
| FORENSICnetBASE/LawENFORCEMENTnetBASE (CRC Press - Taylor & Francis) | Law                   | 2                       |
| Funk & Wagnall's New World Encyclopedia                              | Reference             | 2                       |
| Grove Music Online   | Liberal Studies       | 2                       |
| Le Nouveau Petit Robert  | Reference             | 2                       |
| Literature Criticism Online titles (Gale)                            | Liberal Studies       | 2                       |

Ontario Colleges eBook Initiative  
Request for Information (RFI)

| eBook Title or Package subscription                          | Subject Area          | Number of Subscriptions |
|--|-----------------------|-------------------------|
| Mental Measurements Yearbook                                 | Nursing               | 2                       |
| National Building Code (Paperless Online - NRCC)             | Trades & Technology   | 2                       |
| National Fire Code (Paperless Online - NRCC)                 | Trades & Technology   | 2                       |
| National List of Advertisers                                 | Business              | 2                       |
| Ontario Electrical Safety Code (Orderline)                   | Trades & Technology   | 2                       |
| ScienceDirect Soc. and Beh. Sciences E-Book Coll. (Elsevier) | Liberal Studies       | 2                       |
| STAT!Ref (Teton Data Systems)                                | Nursing               | 2                       |
| USP-National Formulary                                       | Nursing               | 2                       |
| Overdrive  | Liberal Studies       | 2                       |
| American Film Scripts Online                                 | Liberal Studies       | 1                       |
| ASM Handbooks Online   | Trades & Technology   | 1                       |
| British Pharmacopoeia (The Stationary Office)                | Nursing               | 1                       |
| Canadian Subsidy Directory                                   | Business              | 1                       |
| CICA International Financial Reporting Standards             | Business              | 1                       |
| CRC ENGnetBASE (Taylor and Francis)                          | Trades & Technology   | 1                       |
| Ency of Agricultural and Food and Bio Engineering            | Trades & Technology   | 1                       |
| Ency of Major Marketing Campaigns                            | Business              | 1                       |
| Encyclopedia of Human Nutrition (Elsevier)                   | Reference             | 1                       |
| Encyclopedia of Mathematics & Society                        | Reference             | 1                       |
| Encyclopédie de l'État du monde                              | Reference             | 1                       |
| Etherapeutics  | Nursing               | 1                       |
| FOODnetBASE (CRC Press - Taylor & Francis)                   | Hospitality / Tourism | 1                       |
| Gale e-Books   | Liberal Studies       | 1                       |
| ILO Encyclopedia   | Trades & Technology   | 1                       |
| Le Grand Robert & Collins                                    | Reference             | 1                       |
| Merck Index (Medicines Complete)                             | Nursing               | 1                       |
| Migra's Canadian Export Guide (Migra Intl.)                  | Business              | 1                       |
| National Plumbing Code (Paperless Online - NRCC)             | Trades & Technology   | 1                       |
| North American Theatre Collection (Alexander Press)          | Liberal Studies       | 1                       |
| Oxford Language Dictionary                                   | Reference             | 1                       |
| Oxford Reference - Western Civilization                      | Reference             | 1                       |
| Sage Handbooks   | Nursing               | 1                       |
| Webster's Dictionary Online                                  | Reference             | 1                       |

### Appendix D: College Library Systems

| College  | Library System              | Learning Management System                           | Discovery Service/Layer          |
|--|-----------------------------|--|----------------------------------|
| Algonquin College  | SirsiDynix                  | Blackboard   | Ebsco Discovery Service (EDS)    |
| Collège Boréal   | Evergreen                   | Angel  | 360core                          |
| Cambrian College   | Mandarin Library Automation | Moodle   | 360core                          |
| Canadore College & Nipissing University                        | SirsiDynix                  | Desire to Learn (D2L) (Canadore)<br>Blackboard (Nip) | -                                |
| Centennial College   | SirsiDynix                  | Desire to Learn (D2L)                                | Summon (Serials Solutions)       |
| La Cité collégiale   | SirsiDynix                  | D2L  | -                                |
| Conestoga College  | SirsiDynix                  | Angel  | EDS                              |
| Confederation College  | SirsiDynix                  | Blackboard   | EDS                              |
| Durham College & University of Ontario Institute of Technology | SirsiDynix                  | D2L  |                                  |
| Fanshawe College   | SirsiDynix                  | D2L  | EDS                              |
| Fleming College  | SirsiDynix                  | D2L  | EDS                              |
| George Brown College   | SirsiDynix (c)              | Blackboard   | EDS                              |
| Georgian College   | SirsiDynix (c)              | Blackboard   | TBD transitioning from 360Search |
| Humber College & University of Guelph-Humber                   | SirsiDynix                  | Blackboard   | Summon                           |
| Lambton College  | Mandarin Library Automation | Angel  | -                                |
| Loyalist College   | Mandarin Library Automation | Blackboard   | EDS                              |
| Mohawk College   | Evergreen                   | D2L  | 360Core                          |
| Niagara College  | Evergreen                   | Blackboard   | Summon                           |
| Northern College   | SirsiDynix (c)              | Blackboard   | -                                |
| St. Clair College  | Surpass Safari v 6.2        | Blackboard   | Summon                           |

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| <b>College</b>       | <b>Library System</b> | <b>Learning Management System</b> | <b>Discovery Service/Layer</b> |
|----------------------|-----------------------|-----------------------------------|--------------------------------|
| St. Lawrence College | SirsiDynix            | Blackboard                        | Summon                         |
| Sault College        | SirsiDynix            | Blackboard                        | Summon                         |
| Seneca College       | Endeavour             | Blackboard                        | Summon                         |
| Sheridan College     | SirsiDynix            | D2L                               | Summon                         |

## Appendix E: Evaluation Criteria

### Ontario Colleges eBook Consortium Project Initiative Request for Information (RFI) Evaluation Criteria

| Evaluation Criteria  | Weighting %    |
|--|----------------|
| 1. Demonstrated ability to help meet the Colleges' Vision Statements listed in Section 6.1 of the RFI.   | 30.00%         |
| 2. Ability to help create a complete eBook ecology (open to cooperate with other vendors or service providers as needed, to deliver a seamless, end-to-end, eBook service).  | 20.00%         |
| 3. Experience and record of success with projects of similar scope and intent.   | 10.00%         |
| 4. Flexibility, scalability and demonstrated ability to adjust to technological and market pressures.  | 10.00%         |
| 5. Pricing and/or Business models used for similar project components that fit the needs and requirements of Colleges of all sizes and with varied program offerings.  | 15.00%         |
| 6. Simplicity/completeness and creativity of the solution(s) being proposed.   | 5.00%          |
| 7. Enhanced accessibility features such as adherence to any relevant legislation, such as Accessibility for Ontarians with Disabilities Act (AODA); Canadian Copyright Law; both Canadian and Ontario privacy legislation, and; English and French interfaces for both public and staff. | 10.00%         |
| <b>Total Percent</b>   | <b>100.00%</b> |