



# Collaborative Library Services Platform Request for Information

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**OCLS RFI #2019-001**

Issue Date: 15 April 2019

Submission Deadline: 21 May 2019 – 2:00pm EST

All information contained within this document should be considered confidential and is provided to give proponents an understanding of the Collaborative Library Services Platform Committee requirements.

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# 1 INTRODUCTION

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On behalf of College Libraries Ontario (CLO), the Collaborative Library Services Platform Committee (CLSP) is initiating a project to explore a shared library services platform (LSP) to replace integrated library systems now in use in the 24 libraries. The Ontario Colleges Library Service (OCLS) is handling all communications pertaining to the Request for Information process on behalf of CLO and the CLSP.

## 2 OBJECTIVES AND SCOPE OF THIS REQUEST FOR INFORMATION

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The objective of this Request for Information (RFI) is to identify and explore capabilities and practices of vendors that may be viable providers of products or services necessary to support a shared Library Services Platform among Ontario college libraries. Responses to this RFI, and possible follow-up consultations, may be used to build a business case for proceeding to the next phase of the project. This RFI process may inform the development of a Request for Proposal (RFP) for an LSP. Information given in the RFI will not be used to pre-qualify vendors for the RFP.

We have intentionally defined this RFI at a broad level to gain a better understanding of the current LSP market and to assess the options for collaboration between our institutions. Respondents are invited to include any information relevant to the CLSP committee not explicitly covered by this RFI.

## 3 ABOUT THE COLLABORATIVE LIBRARY SYSTEMS PLATFORM COMMITTEE

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The Collaborative Library Systems Platform Project Committee (CLSP) is a committee sponsored by College Libraries Ontario (CLO), the collaborative body comprised of the 24 Ontario College Libraries that advocates on behalf of students for the best college library services and resources. CLO has a long history of successful collaborative projects that have supported innovative library services for the benefit of students, researchers, and faculty across Ontario. This includes the SIRSI Consortium, which is made up of a group of 13 Ontario college libraries that share the SirsiDynix Integrated Library System (ILS). This consortium is managed by the Ontario College Library Service (OCLS), which provides a suite of services for the benefit of the 24 Ontario college libraries.

The CLSP Committee will lead the investigation into the purchase of a shared Library Services Platform for the college libraries that have expressed interest. The committee was established as a result of the work of the Advancing Colleges Collaborative Excellence in Student Success (ACCESS) project, and a recommendation from the SIRSI Consortium Steering Group. Of the 24 college libraries, 13 are currently involved in a pre-existing SIRSI Consortium, and other non-members have indicated an interest in migrating to a new system in the near future, potentially by joining the consortium when a solution is identified.

### 3.1 CLSP VISION

The vision of the CLSP is two-fold. The project will support efficiency and collaboration amongst member libraries by implementing access to a modern, next-generation library services platform that will allow us to grow our collaborations into the future, perhaps in ways beyond which we can currently envision.

The project will also benefit end-users (students, faculty, researchers) by providing improved access and discoverability of resources.

### 3.2 CLSP VALUES

The work of the CLSP Project will:

- Support a culture of innovation at Ontario Colleges
- Employ creative use of technology to enhance library services that allows for optimal staff efficiency and end user discovery
- Foster enhanced collaboration between member libraries
- Enhance access to learning resources for students, researchers, and faculty across the Ontario colleges
- Facilitate purchases without limiting choice or negating any other requirement.

### 3.3 SYSTEMS, SERVICES AND SOFTWARE APPLICATIONS CURRENTLY USED IN ONTARIO COLLEGES

The following table lists the library management systems in use by the Ontario colleges as of March 2019.

College	Integrated Library System or Library Management System	Learning Management System	Discovery Layer	Link Resolver
<a href="#">Algonquin</a>	SirsiDynix (SIRSI consortium)	Blackboard	EDS	Full Text Finder
<a href="#">Boréal</a>	Evergreen	D2L	360 Core	360 Link
<a href="#">Cambrian</a>	Mandarin OASIS	Moodle	EDS	Full Text Finder
<a href="#">Canadore</a>	SirsiDynix	D2L	(none)	SFX
<a href="#">Centennial</a>	SirsiDynix (SIRSI consortium)	D2L	Summon	360 Link
<a href="#">Conestoga</a>	SirsiDynix (SIRSI consortium)	D2L	EDS	Full Text Finder
<a href="#">Confederation</a>	SirsiDynix (SIRSI consortium)	Blackboard	EDS	Full Text Finder
<a href="#">Durham</a>	SirsiDynix	D2L	Summon	360 Link
<a href="#">Fanshawe</a>	SirsiDynix	D2L	EDS	Full Text Finder
<a href="#">Fleming</a>	SirsiDynix (SIRSI consortium)	D2L	EDS	Full Text Finder
<a href="#">George Brown</a>	SirsiDynix (SIRSI consortium)	Blackboard	EDS	Full Text Finder
<a href="#">Georgian</a>	SirsiDynix (SIRSI consortium)	Blackboard	EDS	Full Text

				Finder
<a href="#">Humber</a>	SirsiDynix (SIRSI consortium)	Blackboard	Summon	360 Link
<a href="#">La Cité</a>	SirsiDynix (SIRSI consortium)	D2L	(none)	(none)
<a href="#">Lambton</a>	Mandarin M5	D2L	(none)	(none)
<a href="#">Loyalist</a>	Alma	Blackboard	Primo	Alma Link Resolver
<a href="#">Mohawk</a>	Evergreen	D2L	EDS	Full Text Finder
<a href="#">Niagara</a>	Evergreen	Blackboard	Summon	360 Link
<a href="#">Northern</a>	SirsiDynix (SIRSI consortium)	Blackboard	(none)	(none)
<a href="#">Sault</a>	SirsiDynix (SIRSI consortium)	D2L	EDS	Full Text Finder
<a href="#">Seneca</a>	Alma	Blackboard	Primo	Alma Link Resolver
<a href="#">Sheridan</a>	SirsiDynix (SIRSI consortium)	D2L	Summon	360 Link
<a href="#">St. Clair</a>	Centriva	Blackboard	Summon	360 Link
<a href="#">St. Lawrence</a>	SirsiDynix (SIRSI consortium)	Blackboard	EDS	Full Text Finder

Additional information on Ontario colleges and their libraries can be found on the Ontario Colleges Library Service website at this URL: <https://www.ocls.ca/colleges>

## 4 INSTRUCTIONS

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Thank you for your response to this request for information. The information you provide will be shared with the 24 college libraries that make up CLO and carefully considered. May 21, 2019 at 2:00pm is the date and time by which written responses must be received as email attachments sent to Thomas Guignard (tguignard@ocls.ca). Late responses may not be considered.

Responses should follow the structure of the "RFI Response Format" in Appendix A and include acknowledgement of acceptance of the Disclaimers set out in Appendix B which acknowledge, among other things, that this RFI and any Respondent submissions shall not create a legal relationship or obligation regarding the procurement of any good or service. The CLSP is under no obligation to enter into any contract as a result of this RFI.

### 4.1 QUESTIONS

Please submit any questions and clarifying information pertaining to this RFI by email to Thomas Guignard (tguignard@ocls.ca) by April 19<sup>th</sup>, 2019.

## 4.2 RFI PROCESS TIMELINE

- April 15, 2019: RFI Issued
- April 19, 2019: Question Period Ends
- April 26, 2019: Response to questions will be provided
- May 21, 2019 (2:00pm EST): Submissions Due

## 4.3 CONTACT

Please direct all communication relating to this RFI to

Thomas Guignard, Director of Services  
Ontario Colleges Library Service OCLS  
74 Gervais Drive, Toronto ON, M3C 1Z3, Canada  
[tguignard@ocls.ca](mailto:tguignard@ocls.ca)  
1-647-722-9330

## 5 APPENDIX A – RFI RESPONSE FORMAT

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Respondents are strongly urged to follow this format in their responses to this RFI.

### 5.1 EXECUTIVE SUMMARY

Provide an executive summary of your response and recommended solutions.

### 5.2 COMPANY OVERVIEW, QUALIFICATIONS, EXPERIENCE & STRATEGIC FIT

Provide an overview of your qualifications and business operations and list any expected subcontractors. Include how you envision a strategic fit between your organization and Ontario Colleges.

### 5.3 AREAS OF INTEREST IN PROPOSED SOLUTION

The following areas of interest have been identified by the colleges as especially relevant to an ideal solution. Please help us assess the capabilities of your system(s) by providing key information on these areas. The areas of interest listed below are defined in broad terms and not in detailed requirements. Responses should describe how your system and services respond to each and provide enough information to convey the capabilities of your system and services.

For each of the areas of interest identified below, please describe the features of your products and services that fulfill the CLSP Values to:

- Support a culture of innovation at Ontario Colleges
- Employ creative use of technology to enhance library services that allows for optimal staff efficiency and end user discovery
- Foster enhanced collaboration between member libraries
- Enhance access to learning resources for students, researchers, and faculty across the Ontario colleges
- Facilitate purchases without limiting choice or negating any other requirement.

Please include the status of each feature you describe. For example, “in production”, “in development”, “planned for future development”. Please provide a timeline for features that are in development and/or not yet in production.

### **5.3.1 Accessibility**

Examples of accessibility features include but are not limited to the following:

- 5.3.1.1 *Compliance with accessibility requirements as set out in the Accessibility for Ontarians with Disabilities Act (AODA).*
- 5.3.1.2 *Compliance with changing legal requirements and accessibility best practices*
- 5.3.1.3 *Addresses backward compatibility, i.e. older operating systems and browsers*
- 5.3.1.4 *Support for both patrons and library staff with limited bandwidth*
- 5.3.1.5 *Functions with different operating systems, e.g. Windows, Linux, Mac, mobile device operating systems*

### **5.3.2 Analytics**

Examples of analytics features include but are not limited to the following:

- 5.3.2.1 *Robust statistics and reporting functionality*
- 5.3.2.2 *Collection analysis*
- 5.3.2.3 *Native reporting tools*
- 5.3.2.4 *Integration with external reporting tools*

### **5.3.3 Bilingual**

Examples of bilingual features include but are not limited to the following:

- 5.3.3.1 *Fully English-French bilingual interfaces for both library staff and end users*



#### **5.3.4 Consortium functions**

Examples of consortium function features include but are not limited to the following:

- 5.3.4.1 *Ability to input, index, and present to users institution-specific information (e.g., notes relating to an institution's specific holding)*
- 5.3.4.2 *Tools for collaborative technical services (selection, acquisition, metadata management), collection management and resource sharing within a consortial setting.*
- 5.3.4.3 *Collaborative workflows*
- 5.3.4.4 *Shared administration and management*
- 5.3.4.5 *Database architecture: distributed or centralized*
- 5.3.4.6 *Shared bibliographic data, holdings, borrowers, etc.*
- 5.3.4.7 *Enabling the exchange of intellectual work and expertise*

#### **5.3.5 Identity management**

Examples of identity management features include but are not limited to the following:

- 5.3.5.1 *Allow for administrative and functional authorization at multiple levels (for example; individual staff or patron, single institution, subset consortia, and consortium-wide)*
- 5.3.5.2 *Ability to present users with only those resources that they are entitled to access (i.e., we don't all license the same e-resources).*
- 5.3.5.3 *Engage Federated Identity Management technology to allow for Single Sign On*

#### **5.3.6 Interoperability and extensibility**

Examples of interoperability and extensibility features include but are not limited to the following:

- 5.3.6.1 *Integration with variable library systems and college enterprise systems such as student information, finance, etc.*
- 5.3.6.2 *Scripting functionality*
- 5.3.6.3 *Application programming interfaces (APIs)*
- 5.3.6.4 *Large-scale data extraction and manipulation*
- 5.3.6.5 *Access to data and system functions*

### **5.3.7 Electronic resource management**

Examples of electronic resource management features include but are not limited to the following:

*5.3.7.1 Digital resource management*

*5.3.7.2 Ability to store and manage vendor license information (contracts) and display terms of use to the public*

*5.3.7.3 Renewal and Vendor relationship management*

### **5.3.8 Knowledgebase and Discovery**

Examples of knowledgebase and discovery features include but are not limited to the following:

*5.3.8.1 Central-index-based discovery*

*5.3.8.2 Integrated knowledgebase and link resolution services*

### **5.3.9 Metadata management**

Examples of metadata management features include but are not limited to the following:

*5.3.9.1 Flexible support for metadata standards such as MARC, Dublin Core, BIBFRAME*

*5.3.9.2 Linked data: ingestion and publishing capabilities; vocabularies*

### **5.3.10 Migration and implementation**

Examples of migration and implementation features include but are not limited to the following:

*5.3.10.1 Data preparation*

*5.3.10.2 Data migration*

*5.3.10.3 Test implementations*

*5.3.10.4 Workflow preparation*

*5.3.10.5 Project management*

### **5.3.11 Patron/library user experience**

Examples of patron/library user experience features include but are not limited to the following:

*5.3.11.1 Patron accounts*

*5.3.11.2 Search*

*5.3.11.3 Scheduling and booking*

5.3.11.4 *Device agnostic/mobile platform*

5.3.11.5 *User experience design*

### **5.3.12 Scalability and performance**

Examples of scalability and performance features include but are not limited to the following:

5.3.12.1 *Reliability*

5.3.12.2 *Uptime percentage*

5.3.12.3 *Room for future growth*

5.3.12.4 *Support of large and varied workload with acceptable performance*

### **5.3.13 Security**

Examples of security features include but are not limited to the following:

5.3.13.1 *Privacy of Patron Data*

5.3.13.2 *Encryption*

5.3.13.3 *Security certifications*

5.3.13.4 *Standards compliance*

5.3.13.5 *Data Ownership*

5.3.13.6 *Data centre location*

### **5.3.14 Staff functions and experience**

Examples of staff functions and experience features include but are not limited to the following:

5.3.14.1 *Unified management of all library-owned and library-licensed resources (print and electronic), including digital assets.*

5.3.14.2 *Media/Equipment booking*

5.3.14.3 *Selection*

5.3.14.4 *Acquisitions*

5.3.14.5 *Fulfillment*

5.3.14.6 *Cataloguing*

5.3.14.7 *Circulation*

*5.3.14.8 Staff Accounts*

*5.3.14.9 Workflows*

*5.3.14.10 Manageability*

*5.3.14.11 Administration*

*5.3.14.12 Automation*

### **5.3.15 System and architecture**

Examples of system and architecture features include but are not limited to the following:

*5.3.15.1 Multi-tenant, cloud based, software-as-a-service*

*5.3.15.2 Software based on flexible architecture (service-oriented or microservices architecture)*

*5.3.15.3 Documented open architecture (such as APIs) that supports custom development and integration with third party products.*

*5.3.15.4 Solution customization for individual college libraries*

### **5.3.16 Vendor Support**

Examples of vendor support features include but are not limited to the following:

*5.3.16.1 Documentation*

*5.3.16.2 Implementation training*

*5.3.16.3 Ongoing training (continuing education)*

*5.3.16.4 Enhancements and Upgrades*

*5.3.16.5 Service interruption alerts*

## **5.4 PRICING INFORMATION**

Please provide estimated pricing information for migration and implementation as well as maintenance and renewal pricing information for the products and services described in section 5.3. Please describe pricing related to a consortium model.

Any pricing information provided by Respondents is for general information purposes and is not intended to be binding on Respondents. Any legally binding pricing or purchasing commitments will only be established where specified by the express terms of a subsequent tender call process or where established through the execution of a written agreement.

## **5.5 IMPLEMENTATION TIMELINE**

Please provide an estimated timeline for full implementation and the technical and workflow services that would include migration.

## **5.6 CUSTOMER REFERENCES**

How many libraries currently use your product or services? How many of these are academic libraries? How many are consortia? If you have been the Supplier for a contract similar in nature to the one envisaged in this RFI, provide that information, along with the name and telephone number of a contact person.

## **5.7 ADDITIONAL INFORMATION**

Please describe any features, information, policies and procedures not already addressed which the CLSP should be aware of.

# **6 APPENDIX B – DISCLAIMERS AND CONTRACT DETAILS**

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In responding to this RFI each Respondent should submit a completed and signed Response that, among other things, acknowledges its acceptance of the RFI Terms of Reference as contained hereunder:

## **6.1 REQUEST FOR INFORMATION NOT A FORMAL COMPETITIVE BIDDING PROCESS**

This RFI is issued for information gathering purposes and is not intended to be a formal legally binding bidding process. Without limiting the generality of the foregoing, this RFI will not necessarily result in any subsequent negotiations, direct contract award, invitational tendering process or open tendering process and does not constitute a commitment by the Ontario Colleges Library Service (OCLS), the Collaborative Library Services Platform Committee (CLSP) or any individual Ontario college to procure goods or services. Any pricing figures submitted by Respondents shall be for general information purposes and will not be binding on firms.

## **6.2 RFI SHALL NOT LIMIT PRE-EXISTING RIGHTS**

This RFI shall not limit any pre-existing rights of OCLS, CLSP and the Ontario colleges. Without limiting the generality of the foregoing, OCLS, CLSP and the Ontario colleges expressly reserve the right, at their discretion:

- to seek subsequent information or initiate discussions with any firm, including firms who did not respond to this RFI;
- to initiate direct negotiations for the procurement of any good or service with any firm or firms regardless of whether the firm or firms responded to this RFI;
- to contact a limited number of firms, which may be limited to those who responded to this RFI, or may include firms who did not respond to this RFI, for the purpose of a competitive procurement for the procurement of any good or service;

- to elect to proceed by way of open tender call where all potential firms, including those who did not respond to this RFI, are eligible to compete for the award of a contract for the supply of any good or service; or
- to elect not to procure the good or service that is the subject of this RFI.

These expressly reserved rights are in addition to any and all other rights of OCLS, CLSP and the Ontario colleges that existed prior to the issuance of this RFI.

### **6.3 PRICING INFORMATION FOR GENERAL INFORMATION PURPOSES ONLY**

Any pricing information provided by Respondents is for general information purposes and is not intended to be binding on Respondents. Any legally binding pricing or purchasing commitments will only be established where specified by the express terms of a subsequent tender call process or where established through the execution of a written agreement.

### **6.4 INFORMATION ONLY AN ESTIMATE**

OCLS, CLSP and the Ontario colleges make no representation, warranty or guarantee as to the accuracy of the information contained in the RFI or issued by way of addenda. Any quantities shown or data contained in this RFI, or provided by way of addenda, are estimates only provided as general background information.

### **6.5 PARTIES SHALL BEAR THEIR OWN COSTS**

OCLS, CLSP and the Ontario colleges shall not be liable for any expenses incurred, including the expenses associated with the cost of preparing responses to this RFI. The parties shall bear their own costs associated with or incurred through this RFI process, including any costs arising out of or incurred in: (a) the preparation and issuance of this RFI; (b) the preparation and making of a submission; or (c) any other activities related to this RFI process.

### **6.6 ACCURACY OF RESPONSES**

The Respondent acknowledges that the information provided is, to the best of its knowledge, complete and accurate.

### **6.7 SUBMISSIONS PROPERTY OF ONTARIO COLLEGES LIBRARY SERVICE (OCLS)**

Except where expressly set out to the contrary in this RFI or in the Respondent's submission, the submission and any accompanying documentation provided by a Respondent shall not be returned.

### **6.8 CONFIDENTIAL INFORMATION OF THE CONSORTIUM**

All information provided by or obtained from in any form in connection with this RFI either before or after the issuance of this RFI: (a) is the sole property of OCLS and must be treated as confidential; (b) is not to be used for any purpose other than replying to this RFI; (c) must not be disclosed without prior written authorization from OCLS; and (d) shall be returned by the Respondents to OCLS immediately upon request.

A Respondent may not at any time directly or indirectly communicate with the media in relation to this RFI without first obtaining the written permission of OCLS.

## **6.9 FREEDOM OF INFORMATION AND PROTECTION OF PRIVACY ACT**

The Respondent consents to OCLS's collection of the information as contemplated under the RFI for the uses contemplated under the RFI.

Information provided by a Respondent may be released in accordance with the Freedom of Information and Protection of Privacy Act, R.S.O. 1990, c.F.31, as amended. A Respondent should identify any information in its submission or any accompanying documentation supplied in confidence for which confidentiality is to be maintained by OCLS. The confidentiality of such information will be maintained by OCLS, except where an order by the Information and Privacy Commission or a court requires OCLS to do otherwise. The Respondent consents, pursuant to subsection 17 (3) of the Freedom of Information and Protection of Privacy Act, to the disclosure, on a confidential basis, of this submission by OCLS to the CLSP committee, representatives from the Ontario Colleges and any third parties retained by OCLS for the purpose of evaluating or participating in the evaluation of this submission.

The Respondent acknowledges that OCLS and CLSP may make public the name of any and all Respondents.

## **6.10 GOVERNING LAW**

This RFI process shall be governed by and construed in accordance with the laws of the Province of Ontario and the federal laws of Canada applicable therein.

# **7 ACKNOWLEDGEMENT**

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The Respondent hereby agrees to the terms set out in Appendix B and in the RFI.

\_\_\_\_\_  
Signature of Witness

\_\_\_\_\_  
Signature of Respondent Representative

\_\_\_\_\_  
Name of Witness

\_\_\_\_\_  
Name and Title

Date of Signature:

I have authority to bind the Respondent.