



The Business of Library Consortia: Models, Structure & Decision-Making

An Environmental Scan and Research Study

OCLS RFQ #2015-005

November 2015

All information contained within this document should be considered confidential and is provided to give bidders an understanding of the Ontario Colleges Library Service requirements.

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INTRODUCTION

1.1 Ontario Colleges Library Service and College Libraries

The Ontario Colleges Library Service (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 each of Ontario's 24 publicly-funded colleges of applied arts and technology, including two French language colleges.

Heads of Libraries & Learning Resources (HLLR) is comprised of the directors (or designates) of libraries and learning resources/learning commons (college libraries) of each of Ontario's 24 publicly funded colleges, and serves as an advisory group to OCLS.

One of OCLS's core services is research, as defined and recommended by HLLR, undertaken to allow the colleges to maintain currency and to understand the potential impact of changes or emerging trends in the academic library environment. OCLS works with the HLLR on the definition of research projects, on the review of the research findings and project deliverables, and manages the research projects to achieve successful outcomes

1.2 Project Background

The Heads of Libraries and Learning Resources (HLLR) leads in creating transformative 21st century member libraries by leveraging a shared platform of information resources, expertise and trusted relationships. In conjunction with the Ontario Colleges Library Service (OCLS), HLLR encourages and sustains cost-effective partnerships to achieve collaboratively what cannot be accomplished singularly. HLLR and OCLS wish to undertake an analysis of collaborative models and organizational structures to determine best practices for achieving maximum collective benefits from the collaborative activities and services of the Ontario college libraries.

HLLR, OCLS and the college libraries are in the process of planning a Library Leaders Summit for March 7 and 8 2016. The Summit will give the HLLR members, OCLS and other key stakeholders the opportunity to come together in person to consider strategic initiatives and determine priorities and projects for FY 2016/17. Preliminary results from this research will form a foundation for discussions at this meeting and going forward as HLLR and OCLS work together to leverage collaborative strengths.

2. BIDDING PROCESS

2.1 Intent to Respond

Send a confirmation of your intent to submit a proposal by November 27, 2015, as noted in the Schedule (Section 2.3). Please include the name, title, and contact information for the company representative with whom we will communicate, and send via email to:

Attention: Virginia Roy,
Director of Services
Ontario Colleges Library Service
Email: vroy@ocls.ca
Phone: 647-722-9306

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

2.2 Bid Submission

Two 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: Virginia Roy,
Director of Services
647-722-9306

Bids are to be received on or before: **December 14, 2015 at 3:00pm**

Bids received after the deadline will not be considered.

Bids must be valid for 90 days from the date bids are due.

Additionally, a follow up electronic copy of the bid is requested and should be sent to:

Attention: Virginia Roy,
Director of Services
Ontario Colleges Library Service
Email: vroy@ocls.ca
Phone: 647-722-9306

2.3 Schedule

Date	Event
November 16, 2015	RFQ issued and distributed
November 27, 2015	Intent to Respond submitted by bidders
December 4, 2015	Last date for questions from bidders
December 8, 2015	Formal response to all questions submitted by bidders

December 14, 2015 at 3:00pm	Proposals are due
December 14-December 21, 2015	Evaluation and recommendation approval period
December 22-January 4, 2016	Contract negotiation
January 4, 2016	Announcement of successful bid and start of project

During the evaluation period, OCLS may request clarifications from and a meeting with bidders.

OCLS, on behalf of HLLR, requests that the research be carried out as soon as possible in order to provide critical information for decisions being made during the next fiscal year.

Dates subsequent to the bids being submitted are estimates only and are subject to modification without notice to bidders.

All firms that submit bids will be informed of the winning bid. The winning bidder will receive a formal award letter.

2.4 Bid Formats

All responses must include the following elements:

- Bidding Form (Section 5) (Note: Form requires signature)
- Executive Summary
- Project plan with description of proposed methodology and schedule of work
- Detailed cost proposal with pricing for project components as appropriate
- Company profile
- References

All responses require two copies to be submitted in writing to the OCLS offices.

One original is required of:

- Bidding Form (Section 5) (Note: Form requires signature)
- Complete response, including cost proposal.
- All appendices

In addition, a complete copy of the bid submission is required by email and should be sent to Virginia Roy at vroy@ocls.ca.

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

2.5 Questions

Questions about the contents of this document should be submitted by email to:

Virginia Roy
Ontario Colleges Library Service
Email: vroy@ocls.ca

Quote Reference in Subject Line: "OCLS RFQ 2015-005 – The Business of Library Consortia: Models, Structure and Decision Making"

A copy of all queries received by the deadline in Section 2.3 and OCLS's responses will be sent to all bidders confirming their intent to respond to the RFQ, as numbered updates to the RFQ document.

Bidders may not rely in any fashion on communication with any staff at OCLS or any college except through the process defined above.

2.6 Subcontracting

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

2.7 Bidder's Costs

OCLS and the college libraries are not liable for any costs incurred by any bidder as part of the bidding process. This includes, but is not limited to, costs to prepare bids, visits to OCLS, and legal or other costs.

2.8 Agreement

OCLS intends to negotiate an agreement with the winning bidder. This RFQ, any amendments to it, and the bidder's full response shall form part of the agreement. In the event that a mutually satisfactory agreement cannot be reached with the selected bidder, OCLS reserves the right to open negotiations with other bidders.

2.9 Evaluation

Proposals will be evaluated on completeness and compliance with the Scope of Work (Section 3), experience with related work, references, project timeframe and schedule, and price.

A joint HLLR-OCLS research committee will make selection of a preferred consultant. The evaluation process will use information drawn from the written submission portion of the proposal, and information supplied by references.

2.10 Budget

The budget range for this project is \$20,000-\$30,000. All proposals should clearly demonstrate their value proposition and provide a detailed breakdown of proposed project costs against outlined deliverables.

The lowest-cost proposal or any proposal will not necessarily be accepted. OCLS reserves the right to waive any requirement if this is in the best interests of the college libraries.

3. SCOPE OF WORK

3.1 Goals of the Research

Among consortia, particularly post-secondary academic consortia, there are a range of program and service goals, organizational structures, funding models and approaches to working collaboratively to develop plans, fund activities and projects, make decisions, and implement and deliver services. The primary goal of this research project is to identify effective models and best practices and to develop recommendations for HLLR and OCLS to consider in leveraging our existing model, and/or for adjustments that could be made to enhance system-wide collaboration.

3.2 Scope of Research

The research should:

- Identify and examine a number of post-secondary, academic consortia with different program and service goals, organizational structures, funding and service models, with a focus on consortia within the sphere of operation of Ontario's college libraries, e.g. Ontario Colleges Application Service (OCAS), as well as other peer Canadian and international academic library consortia, e.g. Ontario Council of University Libraries (OCUL), Canadian Research Knowledge Network (CRKN), The Alberta Library (TAL), British Columbia Electronic Library Network (BCELN), Orbis Cascade (US), National and State Libraries Australasia (NSLA)
- Identify for further analysis those consortia with relevance for HLLR and OCLS.
- Analyze the frameworks for planning, decision-making, and developing and delivering services to identify best practices and effective models for collaborative planning, decision-making, and project implementation and service delivery.
- Analyze organizational structures to identify best practices and effective models for member roles and relationships, project/service management roles and responsibilities, and administrative roles and responsibilities within a consortium.
- Analyze funding models and identify best practices and effective models for fair, transparent and sustainable funding of collaborative activities and services.
- Evaluate and summarize the strengths and weaknesses of various collaborative models.
- Compare and contrast the best practices of effective collaborative models, organizational structures and funding arrangements with our existing model.
- Develop recommendations for leveraging the existing model, and/or for adjustments that could be made in the future to maximize the collective benefits of the collaborative activities and services of the Ontario college libraries.

3.3 Methodology

The primary focus of this research will be on post-secondary academic library consortia however there are some non-library peer organizations operating in the same sphere as the Ontario college libraries that should be identified for analysis.

The research should include, but not be limited to:

- Analysis of the organizational structure, funding model, framework for planning and decision making and practices currently in place in the Ontario colleges library system, and the roles, structure, and focus of the two key organizations that support collaborative work;
- A literature search to uncover key aspects of consortia management and identify best practices, differing models of funding, decision-making, operations, service delivery and strategic objectives that may have relevance for the Ontario college libraries;
- An environmental scan of peer organizations in Ontario, Canada, the United States and globally that are working within a consortial model to determine organizations that will be targeted for additional analysis;
- Interviews with key staff in the identified consortia and their member organizations to gather a clear picture of their organizational structure, funding model, framework for planning and decision making;
- Development of a matrix for comparison and presentation of findings, including organizational structures, strengths, weaknesses, best practices, business/funding models;
- Development of short, medium and longer term recommendations that HLLR and OCLS could consider for implementation that would allow us to maximize the benefits of collaborative activities and strengthen our consortia.

A first step will be to develop and get approval for a detailed project plan that demonstrates how the goals, priorities, and deliverables will be met.

The HLLR-OCLS Task Force will endeavour to provide research, resources, models, or information already available regarding the Ontario college libraries, peer organizations, relevant associations, known resources, and contacts as required.

3.4 Deliverables

Delivery and acceptance of project plan	Week of January 4, 2016
Development and presentation for approval of framework/matrix for comparison, identification of key peer consortia for in depth analysis;	Week of January 18, 2016
Interim report 1 –initial findings of the literature search and environmental scan	Week of February 8, 2016

Interim report 2 – concise report(2-3 pages) focusing on key organizational and funding/business models, strengths/weaknesses, key decision making frameworks, and best/unique practices in 3 to 4 of the most relevant peer consortia	February 25 (for distribution to HLLR members in advance of Library Leaders Summit March 7-8)
Final report including recommendations delivered and accepted	March 25, 2016

The final slate of deliverables and timeframe will be negotiated with the successful bidder as part of the contracting process.

3.5 Timeframe

Time is of the essence for the completion of this research, as the findings will provide critical information for decisions being made during fiscal year 2016/17.

4. GENERAL REQUIREMENTS

4.1 Bid Contact Person

The bidder shall provide a single person to whom all requests for clarifications or additional information may be addressed. Name, telephone, fax, and email contact information is required.

4.2 Company Profile

The bidder shall provide a brief profile of your company and information demonstrating relevant experience and qualifications.

4.3 References

Bidder shall provide three references for work requiring similar knowledge and capacity. Contact information for each of the three references shall be provided.

5. BIDDING FORM

OCLS PROPOSAL #2015-005 – The Business of Library Consortia: Models, Structure and Decision-Making

Bidder:

Company Name: _____

Address: _____

Signature of Signing Officer: _____

Print Name / Title of Signing Officer: _____

Bid Contact Person: _____

Telephone / Fax / Email for Contact: _____

Date Bid is Valid until (DD/MM/YYYY): _____

In order to ensure that all bids are based on the same terms, bidders should list all bid revisions or updates that they have received and whose terms are incorporated in their bids.

List Bid Revisions / Updates:

APPENDIX A – Ontario Colleges – Main campus

College	Main campus
Algonquin College	Ottawa
Collège Boréal	Sudbury
Cambrian College	Sudbury
Canadore College & Nipissing University	North Bay
Centennial College	Toronto
La Cité collégiale	Ottawa
Conestoga College	Kitchener
Confederation College	Thunder Bay
Durham College & University of Ontario Institute of Technology	Oshawa
Fanshawe College	London
Fleming College	Peterborough
George Brown College	Toronto
Georgian College	Barrie
Humber College & University of Guelph-Humber	Toronto
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