ADDENDUM #1 TO OCLS RFP 2020-001 – ISSUED OCTOBER 8, 2020

REMOVE AND REPLACE (CHANGES HIGHLIGHTED IN <mark>YELLOW</mark>)

The following section(s) shall be removed and replaced in their entirety.

Section 1.1.1. About the Collaborative Library Services Platform Committee

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 Colleges Library Service (OCLS), which provides a suite of services for the benefit of the 24 Ontario college libraries.

With OCLS's support, 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. <mark>Eighteen</mark> colleges, including those currently involved in the Sirsi Consortium, have indicated an interest in migrating to a new system.

Section 6.1.4.4 Item 41

41.	HD	System allows an item to be on reserve for multiple courses.		*Please describe whether custom eReserve documents (cf. item <mark>34</mark>) can also be shared across multiple courses.*

Appendix C – Rate Bid Form

Please note that since the initial publication of the RFP, one college has stepped back from the project.

PRICING
1. Proponent should provide a quote in Canadian dollars, excluding applicable taxes. If not, please specify the currency.
2. The pricing details must reflect total cost of ownership and therefore include all costs (purchase, installation, training, usage, support, maintenance etc.) to all parties

concerned (College, supplier, third-party software or integration *) as they apply. (See grid below)

* if exact costs are unavailable, include approximation and reference to actual source

3. The pricing (as described above) must clearly state the cost of any component that would be shared by all participants for any common functionality.
4. The pricing must include clear definitions of the terms of the commitment (i.e. $ initial purchase + $ maintenance/year for a minimum of 5 years).

The project is for phased implementation of <mark>18</mark> institutions in first implementation/migration with implementations of additional partners on an individual basis or small groups. See list of colleges in Appendix D.

7.1 IMPLEMENTATION FOR <mark>18</mark> PARTNERS (INITIAL GROUP)

Specify your Software License Model and Pricing Formula:	

Description	Year 1	Year 2	Year 3	Year 4	Year 5	Assumptions and additional Notes
Software License: For full production system, including all modules and applications						
For a Test environment (Sandbox) for learning and testing as specified in section 6.5.1 – 1.						
For trial access to the products after product demos to allow staff to explore the system functionality on their own as specified in section 6.5.1 – 2 .						

Professional Services:					
Implementation (costs for each step in the implementation plan)					
Data Migration services					
Project Management					
Interfaces/Integration or interoperability as specified in section 6.3.2					
Testing					
Training					
Documentation					
Additional charges for Phased Installation					
Maintenance Cost and Support:					
Annual Maintenance Cost Including updates / Bug fixes					

Client Support (overall support model that meets the needs of section 6.4.2 and other options available)						
Other costs to meet the requirements of this RFP						
Grand Total						

Appendix D – Participating colleges

Please note that since the initial publication of the RFP, one college has stepped back from the project.

The 18 members for the first phase implementation are:
- Algonquin College
- Collège Boréal
- Cambrian College
- Centennial College
- Conestoga College
- Confederation College
- Fanshawe College
- Fleming College
- George Brown College
- Georgian College
- Humber College
- La Cité Collégiale
- Lambton College
- ~~Mohawk College~~
- Northern College
- Sault College
- Sheridan College
- St. Clair College
- St. Lawrence College

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

8.1 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
Algonquin	SirsiDynix (SIRSI consortium)	Blackboard	EDS	Full Text Finder
Boréal	Evergreen	D2L	(none)	360 Link
Cambrian	Mandarin OASIS	Moodle	EDS	Full Text Finder
Centennial	SirsiDynix (SIRSI consortium)	D2L	Summon	360 Link
Conestoga	SirsiDynix (SIRSI consortium)	D2L	EDS	Full Text Finder
Confederation	SirsiDynix (SIRSI consortium)	Blackboard	EDS	Full Text Finder
Fanshawe	SirsiDynix	D2L	EDS	Full Text Finder
Fleming	SirsiDynix (SIRSI consortium)	D2L	EDS	Full Text Finder
George Brown	SirsiDynix (SIRSI consortium)	Blackboard	EDS	Full Text Finder
Georgian	SirsiDynix (SIRSI consortium)	Blackboard	EDS	Full Text Finder
Humber	SirsiDynix (SIRSI consortium)	Blackboard	Summon	360 Link
La Cité	SirsiDynix (SIRSI consortium)	D2L	(none)	(none)
Lambton	Mandarin M5	D2L	(none)	(none)
Mohawk	Evergreen	D2L	EDS	Full Text Finder
Northern	SirsiDynix (SIRSI consortium)	Blackboard	(none)	(none)
Sault	SirsiDynix (SIRSI consortium)	D2L	EDS	Full Text Finder
Sheridan	SirsiDynix (SIRSI consortium)	D2L	Summon	360 Link
St. Clair	Centriva	Blackboard	Summon	360 Link
St. Lawrence	SirsiDynix (SIRSI consortium)	Blackboard	EDS	Full Text Finder

8. 2 INSTITUTION PROFILES

Note: figures in the table below are based on latest available data.

Name of Institution	Number of total college FTE	Number of library staff FTE	Estimated number of bibliographic records (all formats)
Algonquin	20,238	20.18	353,046
Boréal	1,383	1.00	4,899
Cambrian	3,274	5.00	42,488
Centennial	11,478	48.62	298,659
Conestoga	10,710	60.02	278,725
Confederation	2,770	6.00	121,096
Fanshawe	14,174	25.50	23,000
Fleming	5,850	5.00	35,085
George Brown	21,116	45.00	409,975
Georgian	9,168	24.00	89,061
Humber	21,963	34.90	142,834
La Cité	4,279	3.00	12,705
Lambton	2,508	5.00	7,168
~~Mohawk~~	~~12,162~~	~~15.00~~	~~63,000~~
Northern	856	5.00	28,493
Sault	1,933	3.80	311,766
Sheridan	16,058	31.00	610,415
St. Clair	7,502	7.00	45,786
St. Lawrence	5,198	8.37	327,727

QUESTIONS AND ANSWERS

QUESTION # 1:

Can you please clarify when reference information is required? Should references be submitted with proposal requirements during Stage I? If so, how many references should be included?

Response: References will only be required for proponents invited to Stage IV (presentations). Proponents will be notified of an invitation to interview and provide a presentation by November 30th. They will then be asked to provide two (2) relevant references. References will need to be provided in advance of the date of the presentation (anticipated week of December 7).

QUESTION # 2:

Item 6.2.6.1 asks about an available digital repository solution. For each library, could you please provide an estimate of the digital collection storage currently used as well as estimates for the next 9 years (to cover the number of years of pricing requested)?

Response: A number of colleges already have a digital repository solution, some individually and some via a multitenant architecture operated by OCLS (see Question #20 for details). Needs vary from college to college, but the development of digital collections (including but not limited to archive materials, faculty and student works, research data, etc.) is a growing trend among Ontario colleges. Proponents are asked to describe whether a digital repository solution is available as part of their proposal, but there are no requirements to detail how existing college digital collections would be migrated into such a repository. If the repository option is priced separately from your main offering, please detail this option in your response. If a number of objects is required in order to provide pricing, an estimate of 6,000 objects per college, or 10 GB storage per college can be used.

QUESTION # 3:

Would you prefer the group share one digital repository site, or would each library need their own individual site?

Response: Each library needs the ability to individually manage and present their collection with their own branding. Either individual repositories, or a solution with a shared repository but individual college instances/interfaces (multitenant architecture) are acceptable.

QUESTION # 4:

The "Comments" cell of requirement 41 [of section 6.1.1.4 on page 45] has a Microsoft Word "Error! Reference source not found. " message. What should the reference be?

Response: The reference is to item 34 in the same section (page 44). Our apologies for this issue. This error has also been addressed in Appendix D Remove and Replace.

QUESTION # 5:

The "Comments" cell instructs us to indicate "cloud or SaaS". In most situations, those two words are synonymous. How do you distinguish "cloud" form "SaaS"?

Response: In the context of this RFP, "cloud solution" or "SaaS - Software as a Service" can be used interchangeably.

QUESTION # 6:

What do the libraries consider to be "key user tasks"? [in item 11, Section 6.1.3, page 40]

Response: These are tasks that library patrons are expected to regularly perform on the system's public interface. Such tasks include, but are not limited to: searching for content, accessing digital content, looking up physical location information (e.g. call numbers), authenticating/signing on, placing or renewing holds, accessing user accounts, editing personal information, etc.

QUESTION # 7:

EZproxy and Open Athens are typically used in patron-facing services while CAS and Shibboleth are used in both patron-facing and staff-facing applications. Please clarify the use cases where requirements 1 and 2 [of Section 6.3.1 on page 64] are to be used on the desired system.

Response:
For requirement 1, the use case is library patrons authenticating in order to access digital resources licensed by their college (e.g. online databases, journal articles, streaming videos, etc.).
For requirement 2, the use case is library patrons and library staff authenticating to access all functionalities of the Library Services Platform that require authentication, including but not

limited to: patrons signing on to their account and placing holds, staff signing on to access the cataloguing interface, staff signing on to access the reporting interface, etc.

QUESTION # 8:

The Feature Detail [of item 11 in Section 6.3.3 on page 69] says "System refreshes licenced content frequently." Please describe the nature of the licensed content.

Response: Licensed content refers to digital content licensed by a college for use by their students, faculty and staff. Such content can include ebooks, online newspapers and magazines, academic journal databases, teaching support materials (e.g. language-learning courses, 3D anatomy resources), ready reference materials (e.g. online encyclopedias, dictionaries, and directories), etc.
The expectation is that the Library Services Platform will include a knowledge base that describes such licensed content so that library users can search for it without libraries needing to catalog each item manually. Since contents of such online licensed collections tend to change regularly (some databases see titles being added or removed on a daily basis, for example), an important feature of a knowledge base is that it is regularly kept up to date to reflect such changes.

QUESTION # 9:

The Feature Detail [of item 15 in Section 6.3.3 on page 70] says "System allows single-click retrieval of online resources." Please describe the nature of the online resources.

Response: In this context, online resources are synonymous with the licensed content described in the response to question 8 above. Such content can include ebooks, online newspapers and magazines, academic journal databases, teaching support materials (e.g. language-learning courses, 3D anatomy resources), ready reference materials (e.g. online encyclopedias, dictionaries, and directories), etc.

QUESTION # 10:

What is a consortial vendor agreement and how does it differ from a consortial license agreement?

Response: The two terms are used interchangeably. These are agreements between a digital content vendor and a group of college libraries to provide access to digital content to college students, faculty and staff. Such agreements are usually negotiated and maintained by OCLS, on

behalf of the college libraries and include both pricing models and the terms under which the access to licensed content is granted.

QUESTION # 11:

In Appendix C you mention additional partners may be added to this project in the future. Who do you anticipate would be additional partners, and is there an expected or possible date at which they would join the project?

Response: Additional partners would be Ontario colleges not among the initial list of colleges participating in the CLSP initiative. Out of the 24 publicly funded colleges in Ontario, 18 have expressed their interest in this project, but the final decision to join will be made on a college by college basis. It is possible, that fewer than 18 colleges will end up being part of the initial group of members, with others joining later as their local priorities evolve. In either case, there are no expected join dates at this stage. In Section 7.2 of the RFP, vendors are invited to provide details about their pricing formula for additional members (e.g. based on full-time-equivalent/FTE numbers, number of holdings, etc.) in order for colleges to evaluate their ability to join at a later date, if need be.

QUESTION # 12:

Do the OCLS members not listed as participating institutions in Appendix D expect to receive services from the central office under this project? If so, please describe so that we can better understand any expectations regarding interoperability with other systems and our proposed solution.

Response: OCLS will continue to provide existing services to all 24 publicly-funded Ontario colleges. A full list of these services can be found at https://www.ocls.ca/services. It is expected that a number of these services will interact closely with the LSP chosen in this project, in particular:

- OCLS provides consortial negotiation of digital resources and the associated management of licensing agreements, invoicing and college billback, and enabling access to licensed content. Such agreements managed by OCLS involve both colleges participating in this project and others. Please specify in Section 6.2.4 of the RFP which electronic resource management features of your solution will enable the consortial management of such resources.
- Through the Remote Access service, OCLS provides a consortial EZProxy instance allowing colleges participating in the service to provide authenticated access to licensed resources to their users. Unless your solution provides a similar functionality, it will be expected to interact with EZProxy.

- Services associated with the Colleges Union Catalogue, as described in Section 1.1.5 of the RFP.

QUESTION # 13:

On p. 16, Section 4.1.1, "Timetable" notes an anticipated project start date. Do you have an anticipated go-live date?

Response: No go-live date has been fixed yet. Proponents are invited to propose a migration and implementation calendar based on a project start date in the Summer or early Fall of 2021. See also Question #22.

QUESTION # 14:

May we provide links for in answers to questions such as, "Please provide examples of documentation and training materials" or "Describe the resources and materials available for customers, including the consortium office (OCLS), to troubleshoot and/or solve their own problems with the service (e.g., documentation, FAQ, release notes, patch information, etc.)."

Response: Links to examples can be provided. It is the Proponent's responsibility to ensure that all links provided are accurate and functioning, as a broken or failed link could be construed as failure to submit the information.

QUESTION # 15:

Can you clarify the "Anticipated Start Date" listed in the timeline. Does that mean the start of an agreement, kick-off or go-live?

Response: This date refers to the implementation/migration kick-off date. See also Questions #13 and #22.

QUESTION # 16:

Please provide numbers for the total number of unique e-journal titles per participating member.

Response: Unfortunately, colleges are only tracking and reporting number of databases and journal collections, not individual titles. Each database may include several thousand journal

titles. The following table provides an estimate of the number of such databases based on most recent data:

Name of Institution	Estimated number of electronic databases
Algonquin	122
Boréal	28
Cambrian	27
Centennial	115
Conestoga	133
Confederation	103
Fanshawe	92
Fleming	25
George Brown	47
Georgian	59
Humber	124
La Cité	25
Lambton	73
Northern	73
Sault	82
Sheridan	215
St. Clair	49
St. Lawrence	98

QUESTION # 17

Do the staffing numbers provided [in Appendix D] include student/part time workers? If not, how many additional users would need to be able to login to the system?

Response: These numbers include part-time workers as full-time equivalents (e.g. 2 part-time employees working 2.5 days per week would count as 1 FTE). Student workers are not included in these numbers. It can be expected that each college would need up to 10 additional library user accounts in addition to the library staff FTE figures provided in Appendix D.

QUESTION # 18:

Please provide numbers for the total number of digital objects (if applicable)

Response: This information is not available, see Question #2. For the purpose of the RFP response, an estimate of 6,000 objects per college can be used.

QUESTION # 19:

Please provide numbers for the size of your digital collection (in MBs)? (if applicable)

Response: This information is not available, see Question #2. For the purpose of the RFP response, an estimate of 10GB per college can be used.

QUESTION # 20:

Are there any existing digital repositories in place? If so, what platforms are being used?

Response: Some colleges currently operate a digital repository, as per the table below. See Question #2 for more information about current trends.

Name of Institution	Digital repository software	Link
Centennial	Islandora (through OCLS)	https://centennial.core.ocls.ca/
Conestoga	Islandora (through OCLS)	https://conestoga.core.ocls.ca/
Fanshawe	Digital Commons	https://first.fanshawec.ca/
Fleming	Islandora (through OCLS)	https://fleming.core.ocls.ca/
Georgian	Islandora (through OCLS)	https://georgian.core.ocls.ca/
Humber	In-house Drupal site	https://library.humber.ca/collections/repository
Sheridan	Digital Commons	https://source.sheridancollege.ca/

QUESTION # 21:

Are all your member locations in the same timezone?

Response: Yes, all Ontario colleges are in the Eastern Standard Time zone.

QUESTION # 22:

We see the project has an Anticipated Proponent Selection Date of March/April 2021 and an Anticipated Start Date of Summer/Fall 2021. Is the Start Date the expected go-live on the new ILS or the project kick-off date? How long is the anticipated implementation expected to take or what are OCLS' expectations? Thank you.

Response: The Start Date refers to the implementation/migration kick-off date. The go-live date hasn't been scheduled yet. Proponents are invited to present an expected implementation calendar based on their experience and available resources, including estimated go-live date, starting from a kick-off date in early Fall 2021. See also Questions #13 and #15.