**Exhibit 2 Response Criteria**

**Solicitation 43000000027-Rebid**

**ONLINE SUBSCRIPTION FOR STATEWIDE DATABASE SERVICES**

Instructions: The vendor shall use the format provided in this attachment to respond to the RFP requirements. For each requirement listed in Exhibit 1 Specifications and the Bidder Instructions, the vendor shall (1) designate the degree to which the requirement is met and (2) provide additional information or clarification explaining how the requirement is met or if desired, why it is not met. Unless otherwise noted, the responses shall be limited to 1 - 3 paragraphs with a maximum length of two pages. A simple check mark will not be considered an adequate response.

For any customizations identified in this response, the pricing shall be submitted in the Exhibit 3 Price. If the customization is being provided at no cost to the State, the customization shall be listed in the pricing section with a cost of ‘No Charge’.

**MANDATORY SPECIFICATION/REQUIREMENTS**

The supplier shall provide the required coverage of digital resources is as follows:

1. Full-text magazine and journal articles appropriate for meeting the informational, educational, and recreational needs of Oklahoma libraries of all types (public, academic, K-12, and special), including content from both popular periodicals and scholarly publications, including peer-reviewed journals;
2. Content shall cover a wide range of subject areas including, but not necessarily limited to Business, General Reference, and Health; The proposal shall offer a minimum of 5,000 unique titles, of which at least 70% of the minimum of 5,000 shall be full text;
3. Coverage shall include at least the current year, plus three years, and be searchable as a single file;
4. A supplemental proposal that includes additional products over and above what is offered in number one above, targeted specifically to the needs of OSHRE and academic libraries, must be included.
5. Similarities or differences with content targeting each library type shall be identified. Specifically, how does each product meet the needs of the wide range of customers?
6. Indexing, abstracting, and citations shall be included.

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| Fully Meets | Partially Meets | Meets w/Customization | Does not Meet |

Description:

The Supplier shall provide separate pricing for each area of coverage listed above. Suppliers may provide pricing for all items, submit partial proposals on individual line items, or propose different combinations of coverage options (i.e., database bundling). Invoices shall be issued quarterly in arrears.

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Description:

The proposals shall include only modules and features that are currently operational in multiple user sites.

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Description:

The supplier shall indicate the number of potential sites that the products are capable of serving.

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Description:

The proposal shall include an Implementation Plan and describe ongoing Support Services

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Description:

Access to online digital resources shall be through the Internet from a variety of devices, including personal computers, tablets, and handheld mobile devices/cell phones. Access shall be available in libraries, on campuses and in classrooms, and from member libraries’ users accessing information from home or office. Individual participating institutions shall be able to choose to access the digital resources using any of the following methods:

a) IP authentication

b) Via proxy server

c) Referring URLs

d) Login/Password – Any login/password shall be authenticated by Supplier

It is desirable to provide direct access to Oklahoma citizens without the intervention of individual library authentication requirements. If the Supplier has the ability to authenticate on a statewide basis using geolocation or similar technique, the Supplier shall describe the geolocation capabilities and limitations.

The supplier shall describe how remote access to the product(s) occurs.

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Description:

The proposal shall include a description of other protocol compatibilities, if applicable, if NISO Standard version Z39.50 is unavailable.

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Description:

Access to online digital resources shall be available to an unlimited number of simultaneous users twenty-four hours a day, seven days a week, except for a maintenance window during off-peak periods. Suppliers shall specify the times of scheduled normal maintenance window(s), if any, during which service is unavailable. Supplier shall indicate how often Digital content is updated.

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Description:

Only web-based products or services shall be considered under this RFP. Content shall be accessible with standard web browser software. Suppliers shall describe any additional software, special browser plug-ins, or helper applications (e.g., Adobe PDF viewer, media players, applets, proprietary drivers, etc.) that are required for accessing the product(s) included in this proposal or to access the content provided through the product(s). Suppliers shall indicate if a particular browser version or “no earlier than” version is required.

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Description:

Suppliers shall describe alternative interfaces compatible with text-based browsers and/or adaptive software and make them available during the trial demonstration period.

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Description:

**NON-MANDATORY SPECIFICATION/REQUIREMENTS**

Content Parameters

 Suppliers should provide the following information for each product proposed:

 a) Total number of titles in proposed periodical database(s);

b) Total number and percentage of current full-text titles included, excluding open access titles;

c) Average length of back file provided for current full-text titles;

d) Number of current full-text titles providing full text back files as follows:

i. Greater than 1 year, but less than 3 years;

ii. Greater than 3 years, but less than 5 years;

iii. Greater than 5 years, but less than 10 years;

iv. 10 years or more.

e) Describe the full-text content available (e.g., text, text + graphics, page images, etc.).

f) Indicate the file formats in which full-text data is available (HTML or PDF, etc.) and the number and percentage of full-text titles for which each format is available.

g) List the number and percentage of full-text titles for which graphs, charts, and images (or any other graphical content) that were present in the original are NOT included in this offering.

h) If the Supplier proposes to provide multiple periodical databases, provide the percentage of overlap for each.

i) Provide access to a list of embargoed titles. Indicate the number of full-text titles that have embargoes as follows:

 i. Less than 90 days

ii. At least 90 days but less than 6 months

iii. At least 6 months but less than 1 year

iv. 1 year or more

j) Provide the total number and percentage of “closed” titles (any title for which current coverage is not available) in the proposed resources.

k) Provide the total number and percentage of exclusive titles included in the offered resources.

l) Suppliers should provide the following for peer reviewed titles:

i. The number and percentage of current full-text peer reviewed titles that are included in the offer;

ii. Access to this list of peer-reviewed titles;

iii. The number and percentage of embargoed peer reviewed titles;

iv. The number and percentage of exclusive peer reviewed titles.

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Description:

Title List Availability

Suppliers should describe the availability to libraries of title or content lists and descriptions for their product offering(s):

a) Frequency with which title lists are updated, compared to changes occurring with the product(s)

b) Indicate if title lists include start and stop dates for each title.

c) Indicate if embargoed titles are listed.

d) Indicate if peer reviewed titles are designated as such.

e) Suppliers should provide access to full title list for proposed product(s) in electronic format (spreadsheet preferred). Access may be via a web link, as long as the provided list matches the proposed product(s).

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Description:

User Interface and Functionality

Describe the user search interface for the proposed product(s):

a) Is traditional search functionality available (e.g., Boolean, truncation, proximity operators)? Describe any features designed to aid the novice searcher in implementing these functions.

b) Describe any automatic stemming functionality.

c) Describe any spell-checking functionality. Does the system suggest or automatically implement alternate spellings?

d) Describe available search limits (e.g., date, peer review, article type, full-text availability).

e) Describe any “natural language” searching capability.

f) If multiple products are proposed, to what extent can they be searched simultaneously? Are duplicates automatically eliminated?

g) Describe sort options for search results.

h) Printing:

i. Online digital resources should allow for the unlimited down-loading and/or printing of text for no additional fees.

ii. The interface should have the capability to mark records for viewing and/or printing.

iii. The interface should provide a print command that results in printing to a local or network printer.

iv. The Supplier should identify any operating system platforms from which printing cannot be performed or conditions under which printing may not function.

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Description:

Any products offered by the Supplier should be accessible through firewalls configured in common ways accepted by the computer security industry.

a) Suppliers should provide configuration information in their RFP responses if special firewall configurations are required to make the product(s) accessible.

b) Suppliers should indicate if any product(s) offered use a non-standard port for accessing the information.

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Description:

Suppliers should describe the standards met and protocols used to provide interoperability with participating library systems and tools that allow proposed product(s) to link to and be linked from other sources, such as Integrated Library Systems, e-journals, discovery tools, Internet resources, etc.

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Description:

MARC Records

It is desirable that libraries have access to MARC records that meet industry standards for periodicals and monographs that are included in any proposed product(s). Describe the availability of MARC records for titles included in the proposed product(s):

a) Are comprehensive MARC record file(s) available for initial load during implementation?

b) Are periodic MARC record file(s) provided for new titles added, and/or periodic files for deleted or ceased coverage titles?

c) Do the MARC records include standard 9xx holding statements?

d) Do the MARC records include 856 title-direct URLs?

e) What is the source of the MARC records (i.e., in-house, third party Supplier, etc.)? Specify name of source and describe how the provided MARC records meet industry standards.

f) If MARC records are available, the Supplier should be prepared to provide sample records for examination upon request.

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Description:

Training for Library Staff

The Oklahoma Department of Libraries (ODL) expects the successful Supplier(s) to provide a minimum of six (6) days of training each year of the contract to ODL staff and participating libraries staff, including in-person, remote, and hands-on training. This training may include sessions conducted at statewide conferences, such as the Oklahoma Library Association Annual Conference and Oklahoma Society for Technology in Education Conference.

a) Supplier should describe training programs for the staff of the different types of libraries that will be using the offered product(s).

b) Supplier should describe any training or resources specifically designed to aid academic and K-12 teacher librarians, as well as teachers and faculty, in integrating the use of the offered product(s) into the curriculum.

c) Supplier should share examples of other large-scale training programs that have been used to reach a variety of user audiences and levels.

d) Supplier should provide sample training and instructional materials as an electronic appendix to this proposal or point to the availability of such materials online.

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Description:

Training Aids for End Users

a) Describe training and/or point of use instructional materials that are available for end-users.

b) How many physical copies of these aids will be provided free-of-charge to member libraries on request? What is the cost for additional physical copies?

c) Provide sample training and instructional materials as an electronic appendix to this proposal or point to the availability of such materials online.

d) Describe (or provide samples of) any materials that can be adapted or customized for local use. In what electronic format(s) are the materials provided to support local printing.

e) Online help should be available.

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Description:

Promotion and Marketing

Suppliers should describe the type of assistance it will offer to promote its product(s) to the public.

a) Suppliers should describe any public service announcements, or other mass media marketing they are prepared to provide – preferably to media outlets, not to libraries.

b) Does the Supplier use web-based or social media marketing? If so, describe any efforts the Supplier is prepared to provide as a part of this contract.

c) Suppliers should describe promotional materials they can provide, such as bookmarks, posters, table tents, shelf hangers, etc. Suppliers should provide sample materials as an electronic appendix to this proposal or point to the availability of such materials online.

d) How many physical copies of these aids will the Supplier provide free-of-charge to member libraries on request? What is the cost for additional physical copies?

e) Suppliers should describe, or provide samples of, any marketing or promotional materials that can be adapted or customized for local use. Also, describe the electronic format(s) in which the materials are provided to support local printing.

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Description:

f) Products should be branded throughout with logos of the Oklahoma Department of Libraries and Institute of Museum and Library Services and reference both as funders of the service using language to be provided.

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Description:

No advertising for products other than the contracted product(s) should appear anywhere in the interface. The statewide list of registrants should not be used for additional advertising of products not included in the contracted product(s).

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Description:

Usage Statistics and Reports

Usage statistics and reports should be available for all participating institutions and each participating library on a monthly basis.

 a) Suppliers should describe the specific usage statistics that are available.

b) Suppliers should describe the time intervals for which statistics can be generated (e.g., hourly, monthly, annually, etc.).

c) Suppliers should indicate which of the following are available for individual libraries/institutions, by library type (public, academic, K-12, and academic), and cumulative statewide:

i. Total search sessions

ii. Total number of non-overlapping searches

iii. Number of unique users

iv. Number of citation/full text requests/views/downloads/reports, etc.

v. Number of document requests per source (e.g., individual periodical titles)

d) Reports should be available for the preceding month, no later than ten days after the close of that month.

e) Suppliers should describe the format in which statistics are available (e.g. COUNTER, SUSHI, etc.)

f) Suppliers should describe and provide examples of standard usage reports

g) Suppliers should indicate whether such usage reports are provided automatically via e-mail or obtained on request by use of a login/ password protected, web-based application.

h) For usage reports generated by the Supplier’s system, Suppliers should describe the metadata (title of the report, time period covered, any other parameters set by the requestor) included with the body of the report itself, and/or in the text of the e-mail message that accompanies a report.

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Description:

Suppliers should describe the features of any administrative modules and note how such modules are offered to and accessed by participating institutions.

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Description:

Customer Service

a) The Supplier(s) should, at a minimum, provide toll-free technical support for participating libraries available from 7:00 a.m. to 7 p.m. (Central Time Zone), Monday through Friday.

b) Suppliers should describe procedures governing calls to technical support.

c) Suppliers should describe other options available to reach customer service staff (e.g., e-mail, web, chat, etc.).

d) Suppliers should provide Customer Service statistics for the most recent six months:

 i. Resolution within 4 hours of service initiation

ii. Resolution within 24 hours of service initiation

iii. Customer satisfaction scores for the public, academic, K-12, and special library markets

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Description:

Customer Notification

a) Suppliers should describe notification methods for content dropped from or added to Supplier’s product(s) and indicate the timeline for notification.

b) Suppliers should describe notification methods for platform or interface changes or enhancements. Indicate the timeline between notification of customers and implementation of change(s)?

c) Suppliers should describe notification methods for scheduled downtimes, including amount of notice before scheduled downtimes occur.

d) Suppliers should describe policy and methods of notifying customers of periods of unavailability, other than regularly scheduled maintenance, and targeted time period for restoration of services.

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Description:

Suppliers should provide system reports documenting downtimes or system unavailability for the period January 1, 2021, through December 31, 2021, including, but not limited to, vender server software or hardware problems and/or Supplier internet service downtime.

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Description:

Suppliers should describe the system redundancy in place to prevent periods of service unavailability.

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Description:

Start-up and Transition

Access to product(s) should begin no later than October 1, 2022.

a) Current library participants should be automatically enrolled into any new subscription system required by the Supplier(s) awarded the contract.

b) Supplier proposals should describe the process to roll over registration for existing participants.

c) Supplier proposals should describe the process to register new participants, including the length of time between registration and access to the product(s).

d) Supplier should describe the process for elimination of duplicate registrations for participating institutions.

e) The enrollment period should begin prior to October 1, 2022, in order to avoid interruption of service.

f) Supplier should ensure that the Oklahoma Department of Libraries receives all new registration information.

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Description:

Suppliers should describe how individual participating institutions with existing product subscriptions/licenses are affected by the statewide proposal, including options for credits to the libraries.

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Description:

Suppliers should make the following available to an evaluation committee:

 a) Access to offered products

b) Appropriate technical and user manuals

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Description:

**Added Value**

Suppliers should describe in detail each of the following that is available in proposed product(s). Added value should be given for:

The currency of titles included in the product(s) offered.

Excellent = Above the average of the responses

Average = Equal to or near the average of the responses

Fair = Less than the average of the responses

Description:

Lesser percentage of full-text embargoed titles.

Excellent = Less than the average of the responses

Average = Equal to or near the average of the responses

Fair = Above the average of the responses

Description:

High number of full-text titles with embargo periods less than six months.

Excellent = Above the average of the responses

Average = Equal to or near the average of the responses

Fair = Less than the average of the responses

Description:

Product(s) offering a higher percentage of full-text articles as compared to citation only.

Excellent = Above the average of the responses

Average = Equal to or near the average of the responses

Fair = Less than the average of the responses

Description:

Product(s) that provide an online notation as to whether an article is available in full-text, abstract only, or citation only.

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Description:

Product(s) that note full-image and graphics indicators in the results list view.

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Description:

High percentage of full-text titles with back files exceeding three (3) years.

Excellent = Above the average of the responses

Average = Equal to or near the average of the responses

Fair = Less than the average of the responses

Description:

A persistent URL that links to a webpage showing a list of available years and/or volume numbers for that title, rather than to a reverse chronological list of articles.

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Description:

Depth of subject coverage.

Excellent = Above the average of the responses

Average = Equal to or near the average of the responses

Fair = Less than the average of the responses

Description:

Content also available in a language other than English.

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Description:

Delivery of full-text articles, abstracts or citations as PDF files, which can be downloaded or viewed with a web browser.

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Description:

Online, HTML-based or video-streamed product tutorials.

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Description:

Training offered via live webcast.

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Description:

Online user manuals and guides.

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Description:

Context sensitive online help.

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Description:

Product(s) that provides simple and advanced searching capabilities.

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Description:

Natural language searching

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Description:

Search that ignores case sensitivity.

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Description:

Spell-check functionality when initiating searches.

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Description:

Product(s) that provides the capability for e-mailing search results to users.

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Description:

Alerting service that provides e-mail alerts from Supplier for user-saved searches and results.

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Description:

Average response time to user queries during 7:00 am – 7:00 pm, for the month of January 2022 is less than 5 seconds. Suppliers should supply this statistic in their response to be considered for added value.

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Description:

Interface(s) that provide the ability to conduct and retain searches across multiple databases.

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Description:

Ability to provide real time look-up in local Online Public Access Catalog (OPAC).

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Description:

Product(s) that incorporate the ability to support locally customizable user online interlibrary loan and document delivery requests.

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Description:

Proposals that provide discounts for member libraries that procure additional Supplier product(s), expand coverage, or increase functionality of the statewide license.

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Description:

Online registration process for enrolling new, participating organizations.

a) Suppliers should indicate the frequency of notification of new participant registration to the Oklahoma Department of Libraries:

i) Semi-annually

ii) Quarterly

iii) Monthly

iv) Weekly

v) Immediately upon completion/verification of registration

b) Suppliers should indicate the frequency at which a Supplier-generated, consolidated list of participants should be provided to the Oklahoma Department of Libraries:

i) Annually

ii) Semi-annually

iii) Quarterly

iv) Monthly

c) Suppliers should indicate the length of time it takes to eliminate duplicate registrations:

i) Within a month of registration

ii) Within a week of registration

iii) Eliminated at time of registration

Excellent = More frequent responses than the average

Average = Equal to or near the average of the responses

Fair = Less frequent than the average responses

Description:

A process to auto-enroll libraries that are not registered for current products, if possible.

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Description:

Optional usage reports that may be scheduled automatically and distributed via e-mail to each participating library. Examples of reports include in-house vs. remote users; time of day/day of the week; and category of users.

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Description:

Ability for multiple recipients of a registered library to receive usage reports via e-mail.

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Description:

Availability of archived usage data for the life of the contract, retrievable by individual participating libraries.

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Description:

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