

**State of Maine
Master Score Sheet**

RFP# 202404081					
Statewide Database Package of Online Resources					
Bidder Name:		Coughlin Companies (Capstone)	Cengage Learning (Gale) Package 1	Cengage Learning (Gale) Package 2	Cengage Learning (Gale) Package 3
Proposed Cost:		N/A	\$2,072,340	\$2,693,590	\$3,501,520
Scoring Sections	Points Available				
Section I: Organization Qualifications and Experience	15	N/A – rejected	12	12	12
Section II: Proposed Services and Technical Assessment	50	N/A – rejected	25	28	31
Section III: Cost Proposal	35	N/A – rejected	35	27	21
TOTAL	<u>100</u>	<u>N/A - rejected</u>	<u>72</u>	<u>67</u>	<u>64</u>
Bidder Name:		EBSCO Package MyHeritage	EBSCO Package 1 (Complete)	EBSCO Package 2 (Premier)	EBSCO Package 3 (Elite)
Proposed Cost:		N/A	\$4,279,745	\$4,002,652	\$3,540,807
Scoring Sections	Points Available				
Section I: Organization Qualifications and Experience	15	N/A – rejected	15	15	15
Section II: Proposed Services and Technical Assessment	50	N/A – rejected	43	33	31
Section III: Cost Proposal	35	N/A – rejected	17	18	20
TOTAL	<u>100</u>	<u>N/A - rejected</u>	<u>75</u>	<u>66</u>	<u>66</u>

Statewide Database Package of Online Resources

Bidder Name:		World Book Package 1	World Book Package 2		
Proposed Cost:		N/A	N/A		
Scoring Sections	Points Available				
Section I: Organization Qualifications and Experience	15	N/A – rejected	N/A – rejected		
Section II: Proposed Services	50	N/A – rejected	N/A – rejected		
Section III: Cost Proposal	35	N/A – rejected	N/A – rejected		
TOTAL	<u>100</u>	<u>N/A - rejected</u>	<u>N/A - rejected</u>		

Award Justification Statement
RFP#202404081 – Statewide Database of Online Resources

I. Summary

Maine State Library (MSL) is seeking proposals for a single statewide package of online content (databases) that will be accessible to all library types (academic, school, public, special) throughout Maine. This service helps fulfill one of Maine State Library's core statutory functions: fostering and encouraging cooperation among Maine libraries of all types (Title 27, §39).

II. Evaluation Process

There were five evaluators and one RFP coordinator. Lori Fisher, Maine State Librarian, served as RFP coordinator for this process. Jenna Davis, Maine State Library's IMLS LSTA grant coordinator, served as financial expert. Beth Crist, Director of Special Projects for MSL, served as business expert. Tim Pellet from Maine InfoNet served as our subject matter expert around the technical and Digital Maine Library access for this service. Heidi Cook (Library Media Specialist) and Tim Morton (Associate Librarian for Collections at Bowdoin College) represented two major stakeholder groups that use the service (schools and academics, respectively). William Wheeler, Systems Team Leader in the state's Office for Information Technology (OIT), served as the OIT liaison for this process.

After receiving bid packages from four vendors on Tuesday 5/7, the RFP coordinator sent out the Acknowledgment & Disclosure forms. Once they were received back from evaluators, she sent out the 10 bid packages (minus the Cost Proposal portions). The team began reviewing each bid package, without the cost proposal, on Wednesday 5/8 in alphabetical order. The RFP coordinator compiled the consensus notes for the proposal compared to the requested services in the RFP. Once that process was completed for all bidders and their submitted packages, on Monday 5/13 the team scored the Org/Experience and Scope of Services/Implementation portions of each package (again referencing the RFP, not other bidder proposals). The RFP coordinator sent the Cost Proposal documents and the formula outcomes to the evaluation team (late Monday 5/13) and they finished the team consensus notes for the cost proposal portion on Tuesday 5/14.

The RFP coordinator noted on Wed 5/8 that four packages were submitted by three different vendors that did not meet the criteria of addressing all of the content areas listed in the RFP. Those four packages were discussed with the evaluation team and it was agreed to reject all four packages because they did not submit content proposals for more than 88% of the content needs identified in the RFP. MSL will be posting a PQVL RFP in early FY25 to address one-off content area needs.

III. Qualifications & Experience

EBSCO has the longest-running track record of providing this service to libraries nationwide (80+ years). They were very thorough in answering all of the questions in Section II, and received the maximum score in this section because they met or exceeded the requirements.

IV. Proposed Services

EBSCO's Complete package content areas truly stood out as either meeting the requirements (3) or exceeding the requirements (5) as listed in the RFP.

- The package was the most comprehensive and included a high priority information resource for each stakeholder group that uses the service.
- Their definition of "full-text" truly dovetails with the definition of the term in the RFP – meaning that full-text includes original images of articles and contains photos, charts, graphs, etc. that machine-generated pdfs cannot include.
- The number of results for searches are not only relevant but easily accessible in all ways that matters to users.
- The eBook/reference collection pieces are built in throughout content areas, and clearly have a publishing date within the past 10 years.
- The Explora interface for K-12 is highly regarded, with integration with both Google and Microsoft products.
- EBSCO pointed out within the proposal where they do not provide certain services (example – does not integrate with e-reserve systems; only provides geo-authentication for their products).

V. Cost Proposal

EBSCO's Complete package scored the lowest in this section. The total cost for the six year contract term (initial 2 years, plus two 2-year renewal options) is \$4,279,745.

VI. Conclusion

EBSCO's Complete package proposal was the most comprehensive for content out of all submitted packages. They clearly exceeded the requirements for Reader's Advisory, PreK-12, Academic, Small Business, and Career/College/Workforce Building content areas. Their interface and support services are robust, with the only overall drawback to the proposal being the lack of geo-authentication for databases outside of EBSCO's offerings. The evaluators felt that the overall content strengths outweighed this drawback.



**STATE OF MAINE
MAINE STATE LIBRARY**

**Janet T. Mills
Governor**

**Lori Fisher
Maine State Library**

June 5, 2024

Coughlan Companies LLC (Capstone)
1710 Roe Quest Drive
North Mankato, MN 56003-1806
Attn: Connie Ruyter

SUBJECT: Notice of Conditional Contract Award under RFP #202404081,
Statewide Database Package of Online Resources

Dear Connie:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine, Maine State Library for a Statewide Database Package of Online Resources. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

- EBSCO Information Services, LLC

The bidder listed above received the evaluation team's highest ranking. The Department will be contacting the aforementioned bidder soon to negotiate a contract. As provided in the RFP, the Notice of Conditional Contract Award is subject to execution of a written contract and, as a result, this Notice does NOT constitute the formation of a contract between the Department and the apparent successful vendor. The vendor shall not acquire any legal or equitable rights relative to the contract services until a contract containing terms and conditions acceptable to the Department is executed. The Department further reserves the right to cancel this Notice of Conditional Contract Award at any time prior to the execution of a written contract.

As stated in the RFP, following announcement of this award decision, all submissions in response to the RFP are considered public records available for public inspection pursuant to the State of Maine Freedom of Access Act (FOAA). 1 M.R.S. §§ 401 et seq.; 5 M.R.S. § 1825-B (6).

This award decision is conditioned upon final approval by the State Procurement Review Committee and the successful negotiation of a contract. A Statement of Appeal Rights has been provided with this letter; see below.

Thank you for your interest in doing business with the State of Maine.

Sincerely,

A handwritten signature in black ink that reads "Lori Fisher". The signature is fluid and cursive, with the first name "Lori" being more prominent than the last name "Fisher".

Lori Fisher
Maine State Library
lori.fisher@maine.gov
(207) 287-5604

STATEMENT OF APPEAL RIGHTS

Any person aggrieved by an award decision may request an appeal hearing. The request must be made to the Director of the Bureau of General Services, in writing, within 15 days of notification of the contract award as provided in 5 M.R.S. § 1825-E (2) and the Rules of the Department of Administrative and Financial Services, Bureau of General Services, Division of Purchases, Chapter 120, § (2) (2).



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June 5, 2024

Cengage Learning Inc.
27555 Executive Drive, Suite 270
Farmington Hills, MI 48331
Attn: Jackie Sullivan

**SUBJECT: Notice of Conditional Contract Award under RFP #202404081,
Statewide Database Package of Online Resources**

Dear Jackie:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine, Maine State Library for a Statewide Database Package of Online Resources. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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Maine State Library**

June 5, 2024

EBSCO Information Services, LLC
10 Estes Street
Ipswich, MA 01938
Attn: Ed Roche

**SUBJECT: Notice of Conditional Contract Award under RFP #202404081,
Statewide Database Package of Online Resources**

Dear Ed:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine, Maine State Library for a Statewide Database Package of Online Resources. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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Governor**

**Lori Fisher
Maine State Library**

June 5, 2024

World Book Inc.
180 N. LaSalle St, #900
Chicago, IL 60601
Attn: Sandra DiBona

SUBJECT: Notice of Conditional Contract Award under RFP #202404081,
Statewide Database Package of Online Resources

Dear Sandra:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine, Maine State Library for a Statewide Database Package of Online Resources. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

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**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Coughlan Companies LLC (Capstone)

DATE: 5/8/2024

SUMMARY PAGE

Department Name: Maine State Library

Name of RFP Coordinator: Lori Fisher

Names of Evaluators: Heidi Cook, Beth Crist, Jenna Davis, Tim Morton, Tim Pellett, William Wheeler

<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section I. Organization Qualifications and Experience	15	N/A
Section II. Proposed Services and Technical Assessment	50	N/A
Section III. Cost Proposal	35	N/A
<u>Total Points</u>	<u>100</u>	<u>N/A</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Coughlan Companies LLC (Capstone)

DATE: 5/8/2024

**EVALUATION OF SECTION I
Organization Qualifications and Experience**

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section I. Organization Qualifications and Experience	15	N/A

Evaluation Team Comments:

All evaluators agreed that this bidder does not have the qualifications to offer multiple database products across multiple subject areas for all age groups. The bid was rejected and not scored.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Coughlan Companies LLC (Capstone)

DATE: 5/8/2024

**EVALUATION OF SECTION II
Proposed Services and Technical Assessment**

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section II. Proposed Services and Technical Assessment	50	N/A

Evaluation Team Comments:

The evaluation team all agreed that the bidder was unable to respond to over 88% of the requested database content, and as such the bid was rejected and not scored.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Coughlan Companies LLC (Capstone)

DATE: 5/8/2024

**EVALUATION OF SECTION III
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
\$2,072,340	,	N/A – rejected	x	35 points	=	N/A

Evaluation Team Comments:

Cost proposal was not scored.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Cengage Learning Inc. – Package 1

DATE: 5/9/2024

SUMMARY PAGE

Department Name: Maine State Library

Name of RFP Coordinator: Lori Fisher

Names of Evaluators: Heidi Cook, Beth Crist, Jenna Davis, Tim Morton, Tim Pellett, William Wheeler

<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section I. Organization Qualifications and Experience	15	12
Section II. Proposed Services and Technical Assessment	50	25
Section III. Cost Proposal	35	35
<u>Total Points</u>	<u>100</u>	<u>72</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Cengage Learning Inc. – Package 1

DATE: 5/9/2024

**EVALUATION OF SECTION I
Organization Qualifications and Experience**

	<u>Points Available</u>	<u>Points Awarded</u>
Section I. Organization Qualifications and Experience	15	12

Evaluation Team Comments:

- I. Appendix C – Qualifications & Experience Form
Bidder is current vendor for the statewide database service (RFP in 2018)
Work with over 40 states and provinces
National industry accolades
Stress continued quality improvement through user surveys
Highly qualified staff
- II. Subcontractors
Not mentioned; this question not included with what they submitted
- III. Organizational Chart
Was included in the overview Appendix C question.
- IV. Litigation
Not mentioned; this question not included with what they submitted
- V. Licensure/Certification (none required)
PDF document about legality to do business in Maine was provided, but in File 3.
- VI. Certificate of Insurance
PDF document COI provided, but in File 3.
Policy expires 3/31/2025

Vendor also provided a pdf file “Attachment 6” in this File 2 submission, and document is a detailed implementation timeline which relates to File 3 and will be reviewed under File 3.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Cengage Learning Inc. – Package 1

DATE: 5/9/2024

**EVALUATION OF SECTION II
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Proposed Services & Technical Assessment	50	25

Evaluation Team Comments:

I. **Appendix F – Proposed Content Template**

A.1. Scope of Services to be Provided: Content

Comprehensive Appendix F comments:

- Consistent indexing and metadata across all databases is a positive
- OneFile & LegalFile for all three packages – positive
- Products are comprehensive for the average library patron (all types of libraries)
- Percentage of open access items is high; therefore paying for convenience of access point
- Strong for general interest (public library use); weaker for academics (less full-text items than desired for academic use)
- Cengage definition of full-text does not correlate to the RFP definition of full-text
- Question whether Cengage’s definition of content areas differs from the content area definitions from the RFP (pgs 9-10)
- Default sharing and viewing format is html (Google & Microsoft interfaces)
- Cannot determine if there are high quality pdfs associated with a resource until the file is downloaded
- It was hard to determine in this section which databases were included with each package

a. General Interest Resources

- Generally met minimum RFP content area requirements.
- How are these curated and updated (Legal forms, Health & Wellness) – residents of ME rely on us for accurate information that reflects Maine law/rules/etc.; are lawyers familiar with ME law involved with the curation?

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Cengage Learning Inc. – Package 1

DATE: 5/9/2024

- Do Literature resources belong in this category? Perhaps should be in PreK-12? Already in Academic and Reference content areas.
 - OneFile Informe Academico is more an academic resource but listed in general [in trial link it does fall under academic resource]
- b. Newspapers
- Generally met minimum RFP content area requirements
 - Limited coverage of Maine newspapers (2)
 - Depth of coverage is not large (number of articles returned are not from a wide variety of resources)
- c. Readers Advisory
- Generally met minimum RFP content area requirements
 - Not a robust resource
 - “Hand-picked genre experts” – who are they and qualifications?
 - DEI efforts noted as a positive
- d. Prek-12 Resources
- Generally met minimum RFP content area requirements
 - Extensive array of resources
 - Proven track record at the secondary school level in current service
 - Indexing & metadata responses the same for all resources but there are age differences between the resources that are not addressed
 - Educator resources are diverse and great for classroom use
 - Integration with typical school district virtual workspaces
- e. Academic Resources
- Generally met minimum RFP content area requirements
 - Gale in Context: College listed twice
 - No business database in this package
 - Many academic institutions would need to supplement this offering with other resources because of lower percentage of full-text content compared to the number of total titles included
 - Low percentage of full-text content based on RFP definition of full text (RFP, pg 4 Terms and RFP pg 9 Academic content area)
 - Lower percentage of peer-reviewed content than desired for academic use
- f. Small Business Resources
- Does not fully meet the content area request in the RFP (page 10) – missing demographics, business/company listings.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

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RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Cengage Learning Inc. – Package 1

DATE: 5/9/2024

- Does include resources for starting a small business (as opposed to researching small businesses)

g. Reference eBooks/ Resources

- Does not fully meet the content area request in the RFP (page 10)
- Many of the book choices shared are over 10 years old – rather unusable and limits to 50 titles that can be chosen out of 250 titles

h. Career, College, & Workforce Building Skills

- Does not meet the content area request in the RFP (page 10) – missing resume builder & tools, test prep, professional licensure prep
- ChiltonLibrary is a good resource for a very narrow user base

B. Scope of Services – Additional Content Resources

- Nothing submitted

II. **Appendix G** – Response to Proposed Services For Part II, Scope of Services to be Provided

A.1. Content

- Cengage automatically identifies individual libraries with the same subscription as a statewide service and then provides pro-rated monetary credit
- Tools in place for various actions around content objections
- Can an article be removed just at the state level for the service or is it school/institution level removal?
- Flexibility – databases can be added/removed, with pro-ration.
- Provided trial information and gave access to training center

A.2. Interface

- Default search mode can be set to advance for many resources at the site level
- Translation functionality seems robust with number of languages (50+) – for print and read-aloud functions; question about article translation functionality because it's a machine translation which often has inaccuracies
- Search assist & support (predictive), and Power search
- Power search does allow users to select databases and eliminates duplicates
- No restrictions on multiple copies/use of resources
- Good visualization tools available (topic-finder tool)
- Browse search in subject categories is also very useful
- Supports lexile-level searching (important for K-12)

STATE OF MAINE TEAM CONSENSUS EVALUATION NOTES

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Cengage Learning Inc. – Package 1

DATE: 5/9/2024

- Includes a citation generator; has RIS format
- “PDF is available” – not actually a pdf representation of the original document. The disclaimer by Gale on the site is that pdfs are machine-generated. This may render a number of full-text items useless since these machine-generated pdfs can’t contain images, diagrams, etc.
- Marking articles only available in two databases – this was mandatory in the RFP, pg 11 A.2.v)
- Does provide easy-to-use permalinks – not authenticated so can be shared (ease of use)
- True integration with Google Drive (one click) – well done
- Integrates with discovery systems (EDS, Primo, Summon)
- Supports open URL
- ADA compliant and supports variety of display options
- Good variety of pre- and post-search limiters
- Robust search features including Boolean, truncation, and wild cards
- Mobile app available
- Offers customizable Gale Pages at the library level (allows tracking of usage beyond state level)

A.3. Authentication

- Supports a variety of authentication systems (useful for academics)
- Has provided our (Maine) geo-authentication service since 2018 (title, article, results levels)
- Customized administrative interface to manage the geo-authentication
- Geo-authentication goes down to the library level
- Infrastructure already in place (little extra implementation time)
- EZproxy available

A.4. Statistics and Reporting

- Provides COUNTER5 reports and SUSHI service (comprehensive)
- All reporting levels requested can be provided
- Can get data on-demand as well as receive on a monthly basis by email
- Variety of formats to receive data

A.5. Training and Marketing

- Very strong section in this proposal, exceeding the RFP requirements
- All types of training offered & materials offered in a variety of formats
- Custom support site provided
- Many samples provided in proposal
- Work with client to provide a customized training plan and marketing plan
- Most document-based materials can be customized

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Cengage Learning Inc. – Package 1

DATE: 5/9/2024

- Offers 5 days of on-site training
- 12 virtual training days included (is that sufficient for our state/libraries needs given our desire to focus on promotion of the DML resources?)
- Customized content for social media, email, etc.; widgets for web sites
- Very clear about expected timelines (Attachment 6 Gale Implementation Plan) – this was put in File 2 but was reviewed by evaluators in this section

A.6. Discovery, Metadata, Linking, and Branding

- Exceeds requirements for this section
- Provides branding at the library level as well as for DML
- Supports linking standard OpenURL
- MARC records source is Xlibris, and they are able to be downloaded & customized

A.7. Support and Service

- Dedicated customer service reps based on library type
- Experience as current vendor is reflected in high customer service model described
- Dedicated support for consortial customers
- A.7.1. & A.7.8 answers not fully complete – perhaps assumed we knew answers because they are the current vendor for the service
- Robust network, infrastructure & connectivity
- Provides website with current status of all resources

B.1. Additional Services

- Gale Pages a tremendously useful part of the resources offered, allowing public & K-12 libraries to customize pages for their web sites and integrate other DML resources
- Dedicated DML support portal

III. Appendix H – Technical Assessment Form

- Data compliance – minimal answer (states they will provide documentation but did not describe it in answer)
- MainIT tab – AWS; very secure and reliable
- Info Security standards – answered all questions [check WW email]
- Cloud Service Provider Reqs & NIST Requirements – stated they comply but no other info provided to fully document compliance

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RFP #: 202404081

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BIDDER: Cengage Learning Inc. – Package 1

DATE: 5/9/2024

**EVALUATION OF SECTION III
Cost Proposal**

Lowest Submitted Cost Proposal		Cost Proposal Being Scored	X	Score Weight	=	Score
\$2,072,340		\$2,072,340	X	35 points	=	35

Evaluation Team Comments:

- 2% increase for each of the two-year renewal periods

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Cengage Learning Inc. – Package 2

DATE: 5/9/2024

SUMMARY PAGE

Department Name: Maine State Library

Name of RFP Coordinator: Lori Fisher

Names of Evaluators: Heidi Cook, Beth Crist, Jenna Davis, Tim Morton, Tim Pellett, William Wheeler

<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section I. Organization Qualifications and Experience	15	12
Section II. Proposed Services and Technical Assessment	50	28
Section III. Cost Proposal	35	27
<u>Total Points</u>	<u>100</u>	<u>67</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Cengage Learning Inc. – Package 2

DATE: 5/9/2024

**EVALUATION OF SECTION I
Organization Qualifications and Experience**

	<u>Points Available</u>	<u>Points Awarded</u>
Section I. Organization Qualifications and Experience	15	12

Evaluation Team Comments:

- I. Appendix C – Qualifications & Experience Form
Bidder is current vendor for the statewide database service (RFP in 2018)
Work with over 40 states and provinces
National industry accolades
Stress continued quality improvement through user surveys
Highly qualified staff
- II. Subcontractors
Not mentioned; this question not included with what they submitted
- III. Organizational Chart
Was included in the overview Appendix C question.
- IV. Litigation
Not mentioned; this question not included with what they submitted
- V. Licensure/Certification (none required)
PDF document about legality to do business in Maine was provided, but in File 3.
- VI. Certificate of Insurance
PDF document COI provided, but in File 3.

Vendor also provided a pdf file “Attachment 6” in this File 2 submission, and document is a detailed implementation timeline which relates to File 3 and will be reviewed under File 3.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Cengage Learning Inc. – Package 2

DATE: 5/9/2024

**EVALUATION OF SECTION II
Proposed Services and Technical Assessment**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services and Technical Assessment	50	28

Evaluation Team Comments:

I. **Appendix F – Proposed Content Template**

A.1. Scope of Services to be Provided: Content

Comprehensive Appendix F comments:

- Consistent indexing and metadata across all databases is a positive
- OneFile & LegalFile for all three packages – positive
- Products are comprehensive for the average library patron (all types of libraries)
- Percentage of open access items is high; therefore paying for convenience of access point
- Strong for general interest (public library use); weaker for academics (less full-text items than desired for academic use)
- What Cengage definition of full-text does not correlate to the RFP definition of full-text
- Question whether Cengage’s definition of content areas differs from the content area definitions from the RFP (pgs 9-10)
- It was hard to determine in this section which databases were included with each package.

a. General Interest Resources

- Generally met minimum RFP content area requirements.
- How are these curated and updated (Legal forms, Health & Wellness) – residents of ME rely on us for accurate information that reflects Maine law/rules/etc.; are lawyers familiar with ME law involved with the curation?
- Do Literature resources belong in this category? Perhaps should be in PreK-12? Already in Academic and Reference content areas.
- OneFile Informe Academico is more an academic resource but listed in general [in trial link it does fall under academic resource]

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Cengage Learning Inc. – Package 2

DATE: 5/9/2024

b. Newspapers

- Generally met minimum RFP content area requirements
- Limited coverage of Maine newspapers
- Depth of coverage is not large (number of articles returned are not from a wide variety of resources)

c. Readers Advisory

- Generally met minimum RFP content area requirements
- Not a robust resource
- “Hand-picked genre experts” – who are they and qualifications?
- DEI efforts noted as a positive

d. Prek-12 Resources

- Generally met minimum RFP content area requirements
- Extensive array of resources
- Proven track record at the secondary school level in current service
- Indexing & metadata responses the same for all resources but there are age differences between the resources that are not addressed
- Educator resources are diverse and great for classroom use
- Integration with typical school district virtual workspaces

e. Academic Resources

- Generally met minimum RFP content area requirements
- Gale in Context: College listed twice
- No business database in this package
- Many academic institutions would need to supplement this offering with other resources
- Low percentage of full-text content based on RFP definition of full text (RFP, pg 4 Terms and RFP pg 9 Academic content area)
- Lower percentage of peer-reviewed content than desired for academic use
- Addition of Gale Business: Insights – meets request for business content in Academic content area (more research focused)

f. **Small Business Resources**

- Generally met minimum RFP content area requirements
- Gale Business: Insights contains international data (comprehensive)

g. Reference eBooks/ Resources

- Does not fully meet the content area request in the RFP (page 10)

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Cengage Learning Inc. – Package 2

DATE: 5/9/2024

- Many of the book choices shared are over 10 years old – rather unusable and limits to 50 titles that can be chosen out of 250 titles

h. Career, College, & Workforce Building Skills

- Generally met minimum RFP content area requirements
- ChiltonLibrary is a good resource for a very narrow user base
- Peterson’s Test & Career Prep is a major addition to this content area for our users (current service only contains Career Prep)

B. Scope of Services – Additional Content Resources

- None

II. **Appendix G** – Response to Proposed Services For Part II, Scope of Services to be Provided

A.1. Content

- Cengage automatically identifies individual libraries with the same subscription as a statewide service and then provides pro-rated monetary credit
- Tools in place for various actions around content objections
- Can an article be removed just at the state level for the service or is it school/institution level removal?
- Flexibility – databases can be added/removed, with pro-ration.
- Provided trial information and gave access to training center

A.2. Interface

- Default search mode can be set to advance for many resources at the site level
- Translation functionality seems robust with number of languages (50+) – for print and read-aloud functions; question about article translation functionality because it’s a machine translation which often has inaccuracies
- Search assist & support (predictive), and Power search
- Power search does allow users to select databases and eliminates duplicates
- No restrictions on multiple copies/use of resources
- Good visualization tools available (topic-finder tool)
- Browse search in subject categories is also very useful
- Supports lexile-level searching (important for K-12)
- Includes a citation generator; has RIS format
- “PDF is available” – not actually a pdf representation of the original document. The disclaimer on this is on the site that pdfs are machine-

STATE OF MAINE TEAM CONSENSUS EVALUATION NOTES

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Cengage Learning Inc. – Package 2

DATE: 5/9/2024

generated. This may render a number of full-text items useless since these machine-generated pdfs can't contain images, diagrams, etc.

- Marking articles only available in two databases – this was mandatory in the RFP, pg 11 A.2.v)
- Does provide easy-to-use permalinks – not authenticated so can be shared (ease of use)
- True integration with Google Drive (one click) – well done
- Integrates with discovery systems (EDS, Primo, Summon)
- Supports open URL
- ADA compliant and supports variety of display options
- Good variety of pre- and post-search limiters
- Robust search features including Boolean, truncation, and wild cards
- Mobile app available
- Offers customizable Gale Pages at the library level (allows tracking of usage beyond state level)

A.3. Authentication

- Supports a variety of authentication systems (useful for academics)
- Has provided our (Maine) geo-authentication service since 2018 (title, article, results levels)
- Customized administrative interface to manage the geo-authentication
- Geo-authentication goes down to the library level
- Infrastructure already in place (little extra implementation time)
- EZproxy available

A.4. Statistics and Reporting

- Provides COUNTER5 reports and SUSHI service (comprehensive)
- All reporting levels requested can be provided
- Can get data on-demand as well as receive on a monthly basis by email
- Variety of formats to receive data

A.5. Training and Marketing

- Very strong section in this proposal, exceeding the RFP requirements
- All types of training offered & materials offered in a variety of formats
- Custom support site provided
- Many samples provided in proposal
- Work with client to provide a customized training plan and marketing plan
- Most document-based materials can be customized
- Offers 5 days of on-site training
- 12 virtual training days included (is that sufficient for our state/libraries needs given our desire to focus on promotion of the DML resources?)

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Cengage Learning Inc. – Package 2

DATE: 5/9/2024

- Customized content for social media, email, etc.; widgets for web sites
- Very clear about expected timelines (Attachment 6 Gale Implementation Plan) – this was put in File 2 but was reviewed by evaluators in this section

A.6. Discovery, Metadata, Linking, and Branding

- Exceeds requirements for this section
- Provides branding at the library level as well as for DML
- Supports linking standard OpenURL
- MARC records source is ExLibris, and they are able to be downloaded & customized

A.7. Support and Service

- Dedicated customer service reps based on library type
- Experience as current vendor is reflected in high customer service model described
- Dedicated support for consortial customers
- A.7.1. & A.7.8 answers not fully complete – perhaps assumed we knew answers because they are the current vendor for the service
- Robust network, infrastructure & connectivity
- Provides website with current status of all resources

B.1. Additional Services

- Gale Pages a tremendously useful part of the resources offered, allowing public & K-12 libraries to customize pages for their web sites and integrate other DML resources
- Dedicated DML support portal

III. Appendix H – Technical Assessment Form

- Data compliance – minimal answer (states they will provide documentation but did not describe it in answer)
- MainIT tab – AWS; very secure and reliable
- Info Security standards – answered all questions [check WW email]
- Cloud Service Provider Reqs & NIST Requirements – stated they comply but no other info provided to fully document compliance

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Cengage Learning Inc. – Package 2

DATE: 5/9/2024

**EVALUATION OF SECTION III
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
\$2,072,340	,	\$2,693,590	x	35 points	=	27

Evaluation Team Comments:

- 2% increase for each of the two-year renewal periods

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Cengage Learning Inc. – Package 3

DATE: 5/9/2024

SUMMARY PAGE

Department Name: Maine State Library

Name of RFP Coordinator: Lori Fisher

Names of Evaluators: Heidi Cook, Beth Crist, Jenna Davis, Tim Morton, Tim Pellett, William Wheeler

<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section I. Organization Qualifications and Experience	15	12
Section II. Proposed Services and Technical Assessment	50	31
Section III. Cost Proposal	35	21
<u>Total Points</u>	<u>100</u>	<u>64</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Cengage Learning Inc. – Package 3

DATE: 5/9/2024

**EVALUATION OF SECTION I
Organization Qualifications and Experience**

	<u>Points Available</u>	<u>Points Awarded</u>
Section I. Organization Qualifications and Experience	15	12

Evaluation Team Comments:

- I. Appendix C – Qualifications & Experience Form
Bidder is current vendor for the statewide database service (RFP in 2018)
Work with over 40 states and provinces
National industry accolades
Stress continued quality improvement through user surveys
Highly qualified staff
- II. Subcontractors
Not mentioned; this question not included with what they submitted
- III. Organizational Chart
Was included in the overview Appendix C question.
- IV. Litigation
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- V. Licensure/Certification (none required)
PDF document about legality to do business in Maine was provided, but in File 3.
- VI. Certificate of Insurance
PDF document COI provided, but in File 3.

Vendor also provided a pdf file “Attachment 6” in this File 2 submission, and document is a detailed implementation timeline which relates to File 3 and will be reviewed under File 3.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Cengage Learning Inc. – Package 3

DATE: 5/9/2024

**EVALUATION OF SECTION II
Proposed Services and Technical Assessment**

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Proposed Services and Technical Assessment	50	31

Evaluation Team Comments

I. **Appendix F – Proposed Content Template**

A.1. Scope of Services to be Provided: Content

Comprehensive Appendix F comments:

- Consistent indexing and metadata across all databases is a positive
- OneFile & LegalFile for all three packages – positive
- Products are comprehensive for the average library patron (all types of libraries)
- Percentage of open access items is high; therefore paying for convenience of access point
- Strong for general interest (public library use); weaker for academics (less full-text items than desired for academic use)
- What Cengage definition of full-text does not correlate to the RFP definition of full-text
- Question whether Cengage’s definition of content areas differs from the content area definitions from the RFP (pgs 9-10)
- It was hard to determine in this section which databases were included with each package

a. General Interest Resources

- Generally met minimum RFP content area requirements.
- How are these curated and updated (Legal forms, Health & Wellness) – residents of ME rely on us for accurate information that reflects Maine law/rules/etc.; are lawyers familiar with ME law involved with the curation?
- Do Literature resources belong in this category? Perhaps should be in PreK-12? Already in Academic and Reference content areas.
- OneFile Informe Academico is more an academic resource but listed in general [in trial link it does fall under academic resource]

b. Newspapers

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Cengage Learning Inc. – Package 3

DATE: 5/9/2024

- Generally met minimum RFP content area requirements
- Limited coverage of Maine newspapers
- Depth of coverage is not large (number of articles returned are not from a wide variety of resources)

c. Readers Advisory

- Generally met minimum RFP content area requirements
- Not a robust resource
- “Hand-picked genre experts” – who are they and qualifications?
- DEI efforts noted as a positive

d. Prek-12 Resources

- Generally met minimum RFP content area requirements
- Extensive array of resources
- Proven track record at the secondary school level in current service
- Indexing & metadata responses the same for all resources but there are age differences between the resources that are not addressed
- Educator resources are diverse and great for classroom use
- Integration with typical school district virtual workspaces
- Addition of GinC: Science & Miss Humblebee’s Academy for this package
- PreK piece was missing from packages 1 & 2
- Humblebee interface is available in Spanish
- Mapped out how this addresses Maine Learning Standards (Humblebee)
- Offline activities included (to allow for limiting screen time for students)

e. Academic Resources

- Generally met minimum RFP content area requirements
- Gale in Context: College listed twice
- No business database in this package
- Many academic institutions would need to supplement this offering with other resources
- Low percentage of full-text content based on RFP definition of full text (RFP, pg 4 Terms and RFP pg 9 Academic content area)
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**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Cengage Learning Inc. – Package 3

DATE: 5/9/2024

- Adds Gale in Context: Science and Gale Interactive: Science [online lab]
- Implies remote learning with lab environment; mentions homeschooling
- Integration of these two with other Gale content pieces is unclear
- These two databases go beyond scope of what was asked for in RFP

f. Small Business Resources

- Generally met minimum RFP content area requirements
- Gale Business: Insights contains international data (comprehensive)
- Adds Gale Business: Plan Builder
- Do end users set up their own accounts because they are building their own plans?
- More service resources than research content resources
- Integrated with Entrepreneurship and Legal Forms
- This could be a huge resource for a small-business centric state like Maine

g. Reference eBooks/ Resources

- Does not fully meet the content area request in the RFP (page 10)
- Many of the book choices shared are over 10 years old – rather unusable and limits to 50 titles that can be chosen out of 250 titles

h. Career, College, & Workforce Building Skills

- Generally met minimum RFP content area requirements
- ChiltonLibrary is a good resource for a very narrow user base
- Peterson's Test & Career Prep is a major addition to this content area for our users (current service only contains Career Prep)

B. Scope of Services – Additional Content Resources

- None

II. Appendix G – Response to Proposed Services For Part II, Scope of Services to be Provided

A.1. Content

- Cengage automatically identifies individual libraries with the same subscription as a statewide service and then provides pro-rated monetary credit

STATE OF MAINE TEAM CONSENSUS EVALUATION NOTES

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Cengage Learning Inc. – Package 3

DATE: 5/9/2024

- Tools in place for various actions around content objections
- Can an article be removed just at the state level for the service or is it school/institution level removal?
- Flexibility – databases can be added/removed, with pro-ration.
- Provided trial information and gave access to training center

A.2. Interface

- Default search mode can be set to advance for many resources at the site level
- Translation functionality seems robust with number of languages (50+) – for print and read-aloud functions; question about article translation functionality because it's a machine translation which often has inaccuracies
- Search assist & support (predictive), and Power search
- Power search does allow users to select databases and eliminates duplicates
- No restrictions on multiple copies/use of resources
- Good visualization tools available (topic-finder tool)
- Browse search in subject categories is also very useful
- Supports lexile-level searching (important for K-12)
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- Does provide easy-to-use permalinks – not authenticated so can be shared (ease of use)
- True integration with Google Drive (one click) – well done
- Integrates with discovery systems (EDS, Primo, Summon)
- Supports open URL
- ADA compliant and supports variety of display options
- Good variety of pre- and post-search limiters
- Robust search features including Boolean, truncation, and wild cards
- Mobile app available
- Offers customizable Gale Pages at the library level (allows tracking of usage beyond state level)

A.3. Authentication

- Supports a variety of authentication systems (useful for academics)

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Cengage Learning Inc. – Package 3

DATE: 5/9/2024

- Has provided our (Maine) geo-authentication service since 2018 (title, article, results levels)
- Customized administrative interface to manage the geo-authentication
- Geo-authentication goes down to the library level
- Infrastructure already in place (little extra implementation time)
- EZproxy available

A.4. Statistics and Reporting

- Provides COUNTER5 reports and SUSHI service (comprehensive)
- All reporting levels requested can be provided
- Can get data on-demand as well as receive on a monthly basis by email
- Variety of formats to receive data

A.5. Training and Marketing

- Very strong section in this proposal, exceeding the RFP requirements
- All types of training offered & materials offered in a variety of formats
- Custom support site provided
- Many samples provided in proposal
- Work with client to provide a customized training plan and marketing plan
- Most document-based materials can be customized
- Offers 5 days of on-site training
- 12 virtual training days included (is that sufficient for our state/libraries needs given our desire to focus on promotion of the DML resources?)
- Customized content for social media, email, etc.; widgets for web sites
- Very clear about expected timelines (Attachment 6 Gale Implementation Plan) – this was put in File 2 but was reviewed by evaluators in this section

A.6. Discovery, Metadata, Linking, and Branding

- Exceeds requirements for this section
- Provides branding at the library level as well as for DML
- Supports linking standard OpenURL
- MARC records source is Xlibris, and they are able to be downloaded & customized

A.7. Support and Service

- Dedicated customer service reps based on library type
- Experience as current vendor is reflected in high customer service model described
- Dedicated support for consortial customers
- A.7.1. & A.7.8 answers not fully complete – perhaps assumed we knew answers because they are the current vendor for the service

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Cengage Learning Inc. – Package 3

DATE: 5/9/2024

- Robust network, infrastructure & connectivity
- Provides website with current status of all resources

B.1. Additional Services

- Gale Pages a tremendously useful part of the resources offered, allowing public & K-12 libraries to customize pages for their web sites and integrate other DML resources
- Dedicated DML support portal

III. **Appendix H – Technical Assessment Form**

- Data compliance – minimal answer (states they will provide documentation but did not describe it in answer)
- MaineIT tab – AWS; very secure and reliable
- Info Security standards – answered all questions [check WW email]
- Cloud Service Provider Reqs & NIST Requirements – stated they comply but no other info provided to fully document compliance

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Cengage Learning Inc. – Package 3

DATE: 5/9/2024

**EVALUATION OF SECTION III
Cost Proposal**

Lowest Submitted Cost Proposal		Cost Proposal Being Scored	x	Score Weight	=	Score
\$2,072,340	,	\$3,501,520	x	35 points	=	21

Evaluation Team Comments:

- 2% increase for each of the two-year renewal periods

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Ebsco – MyHeritage Library Edition

DATE: 5/13/2024

SUMMARY PAGE

Department Name: Maine State Library

Name of RFP Coordinator: Lori Fisher

Names of Evaluators: Heidi Cook, Beth Crist, Jenna Davis, Tim Morton, Tim Pellett, William Wheeler

<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section I. Organization Qualifications and Experience	15	N/A
Section II. Proposed Services and Technical Assessment	50	N/A
Section III. Cost Proposal	35	N/A
<u>Total Points</u>	<u>100</u>	<u>N/A</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Ebsco – MyHeritage Library Edition

DATE: 5/13/2024

**EVALUATION OF SECTION I
Organization Qualifications and Experience**

	<u>Points Available</u>	<u>Points Awarded</u>
Section I. Organization Qualifications and Experience	15	N/A

Evaluation Team Comments:

- I. Appendix C – Qualifications & Experience Form
Have been in business for 80 years and providing database content since 1995 – extensive experience
Relevant/comparable experience provided (RI, KY, CT)
Was a long tenured provider for Maine, and works with many libraries individually 3,000 employees worldwide (breakdown would have been useful)
- II. Subcontractors
Specifically stated that subcontractors will not be used for this proposed service. Implies they do use subcontractors elsewhere.
Mentions using sub-processors – how is that different than sub-contractors?
- III. Organizational Chart
Provided as requested.
Detailed who among leadership would be involved with this contract
Included contact information for key personnel
- IV. Litigation
No litigation disclosed.
- V. Licensure/Certification (none required)
Included ISO27001 certificate
- VI. Certificate of Insurance
Provided as requested.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Ebsco – MyHeritage Library Edition

DATE: 5/13/2024

**EVALUATION OF SECTION II
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Proposed Services and Technical Assessment	50	N/A

Evaluation Team Comments:

The evaluation team all agreed that this package only contained one database, reflecting part of one content area, out of the 8 content areas requested in the RFP, and as such the bid was rejected and not scored.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Ebsco – MyHeritage Library Edition

DATE: 5/13/2024

**EVALUATION OF SECTION III
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
\$2,072,340	,	N/A - rejected	x	35 points	=	N/A

Evaluation Team Comments:

Cost was not evaluated.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Ebsco – Package 1 (Complete)

DATE: 5/10/2024

SUMMARY PAGE

Department Name: Maine State Library

Name of RFP Coordinator: Lori Fisher

Names of Evaluators: Heidi Cook, Beth Crist, Jenna Davis, Tim Morton, Tim Pellett, William Wheeler

<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section I. Organization Qualifications and Experience	15	15
Section II. Proposed Services and Technical Assessment	50	43
Section III. Cost Proposal	35	17
<u>Total Points</u>	<u>100</u>	<u>75</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Ebsco – Package 1 (Complete)

DATE: 5/10/2024

**EVALUATION OF SECTION I
Organization Qualifications and Experience**

	<u>Points Available</u>	<u>Points Awarded</u>
Section I. Organization Qualifications and Experience	15	15

Evaluation Team Comments:

- I. Appendix C – Qualifications & Experience Form
Have been in business for 80 years and providing database content since 1995 – extensive experience
Relevant/comparable experience provided (RI, KY, CT)
Was a long tenured provider for Maine, and works with many libraries individually 3,000 employees worldwide (breakdown would have been useful)
- II. Subcontractors
Specifically stated that subcontractors will not be used for this proposed service. Implies they do use subcontractors elsewhere.
Mentions using sub-processors – how is that different than sub-contractors?
- III. Organizational Chart
Provided as requested.
Detailed who among leadership would be involved with this contract
Included contact information for key personnel
- IV. Litigation
No litigation disclosed.
- V. Licensure/Certification (none required)
Included ISO27001 certificate
- VI. Certificate of Insurance
Provided as requested.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Ebsco – Package 1 (Complete)

DATE: 5/10/2024

**EVALUATION OF SECTION II
Proposed Services and Technical Assessment**

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Proposed Services and Technical Assessment	50	43

Evaluation Team Comments:

I. **Appendix F – Proposed Content Template**

Comprehensive overview:

- Easy to navigate their submitted Appendix F – package differences clearly noted, excellent overview chart provided
- Most package differences were in the academic resources (Elite package has four times less academic resources than Complete package)
- Consistent indexing and metadata across all packages is a positive
- Many of the databases include extensive eBook resources; publication dates are within the last few years
- Explanation of how new concepts are added and terms are assigned - very helpful
- Integration with digital learning environments – exceeds expectations
- Strict vetting process indicates a high degree of vigilance around what is included in these databases
- Transparency throughout document about limitations of the various databases
- References specific aspects of non-K-12 resources which address Maine Learning Results
- Distributed access to over 20,000 reference and nonfiction ebooks throughout the content areas (so specific RFP content area for Reference eBooks/Resources was not included as a separate database entry)

A.1. Scope of Services to be Provided: Content

a. General Interest Resources

- Generally met minimum RFP content area requirements.
- Magazines include full-text New Yorker, Atlantic Monthly, and NY Review of Books

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Ebsco – Package 1 (Complete)

DATE: 5/10/2024

- For LegallInfo – rely heavily on NOLO press; eBooks are recently published; question about whether these resources are provided through NOLO as a third party? Is that true for the legal forms?
- Acknowledged limitations – auto repair source does not include video, for example
- Well-rounded selection of databases for this content area

b. Newspapers

- Generally met minimum RFP content area requirements
- Includes 5 major Maine newspapers
- Unclear how quickly these issues are available through this resource – generally said updates daily but not specific that all content is updated daily
- Seems like 75% of content includes inactive (not currently published) titles
- Global publications included
- Question: statement “Newspaper Source Plus does not include any images or video content” seems to conflict with “Newspaper Source Plus also includes 2 million images” – was second sentence “images” supposed to be “audio”?

c. Readers Advisory

- Exceeds minimum RFP content area requirements.
- Narrative melded the two resources (K-8, Novelist Plus) so it was hard to differentiate
- More than 25 librarians on staff for these two resources – positive
- “created by librarians, for librarians”
- Over 17,000 audio book samples (useful)
- Description of search limiters was very comprehensive and not dependent on an algorithm
- Robust support materials
- These resources has been the leading industry reader’s advisory tool

d. PreK-12 Resources

- Exceeds minimum RFP content area requirements
- Great integration with all major learning management systems
- Well integrated with Google Classroom (Partner with Google for Education)
- Literary Reference Plus includes full text of many classic works
- Program for emerging readers seems to be an excellent add-on to RFP requirements
- Science reference includes experiments (Are those 3D?)

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Ebsco – Package 1 (Complete)

DATE: 5/10/2024

- Also includes a K-8 ebook collection of 950 titles (simultaneous use?)
- Included substantial resources for educators themselves
- Ebook collections for K-12 resources quite robust and up-to-date

e. Academic Resources

- Package 1 exceeds RFP content requirements
- Business source complete has applicability to the Small Business and General content areas
- Has Engineering Source
- Package 1 is the only package with MEDLINE with full text – valuable addition (all U Maine campuses subscribe to it)
- Package 1 also includes Academic Search Complete, Business Source Complete, Food Science Source (not included in packages 1-2)
- Food Science Source has cross-content area applicability, particularly with Career, College & Workforce Building content area
- High school students use these resources extensively

f. Small Business Resources

- In combination with Academic resources in Package 1, this category exceeds the RFP requirements for this content area
- Small Business Sources has eBook selection
- So easy to see that one resource is more “how-to” and the other resource focuses on research
- Accel5 business books summaries & videos is a unique resource

g. Reference eBooks/ Resources

Embedded this content throughout other content area descriptions

h. Career, College, & Workforce Building Skills

- Exceeds minimum RFP content area requirements
- Extensive variety of exam prep options
- Materials in this content area 4th grade through adult (wide scope)
- Due to previous experience with exam prep materials through Learning Express may have loading delay which means users have previous outdated version of exam, not accurate updated version. Is that lag time still there?

B. Scope of Services – Additional Content Resources

- Provided six additional content resources as complimentary but they are already freely available on the Internet (within this package is convenience for user)

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Ebsco – Package 1 (Complete)

DATE: 5/10/2024

- Most are index-only resources (not full-text resources)

II. **Appendix G** – Response to Proposed Services For Part II, Scope of Services to be Provided

A.1. Content

- Description of discounts available to current subscribers of these resources
- Built in curation control for individual libraries (not just at state level)
- Individual libraries can choose to show only full-text and turn of abstract & indexing
- Good overview of how they curate all of their content
- Expressed a willingness to adjust package further during contract phase
- Majority of subject matter experts have Master's degrees aligning with the content areas
- Made trial available to evaluation team

A.2. Interface

- Explora interface for K-12 students, and a public library version
- Detailed language support (31 languages) and accessibility functionality (text-to-speech)
- Transparent about what they can't do (ex. RSS)
- My Dashboard section can extend beyond single search session with individual login
- Does integrate with Google and Microsoft products
- Bookmarking is very easy for records/searches
- Many of the pdfs are original text; some are html text download (where color photos, maps, etc. were listed but not included in pdf). [reference full text definition in RFP] Example in History Reference Source – archaeology
- Search on lexile number or age group – very useful in Explora
- Do not integrate with e-reserve systems (must be done manually) – nice that they pointed that out
- In trial, could not get to MAS complete outside of Explora
- In trial, did search with multiple databases, selected one to look at, and could not get back to original database selection

A.3. Authentication

- Support variety of options EZproxy, OpenAthens
- Provides geo-authentication only for their products

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Ebsco – Package 1 (Complete)

DATE: 5/10/2024

- Does not provide the authentication system DML has in place now (geo-authentication of all resources in DML, not just one vendor resources)

A.4. Statistics and Reporting

- Variety of options including consortia level
- Auto repair resource & MyHeritage – need to email to request stats because third-party resource
- Offers SUSHI and COUNTER5
- Library-specific reports won't be available unless library has a separate account

A.5. Training and Marketing

- Six online customized trainings per year included (seems low given Maine needs)
- Did not provide pricing for additional training requests
- No in-person training offered
- Does offer Ebsco Academy free, on-demand training videos
- Robust support web site (EbscoConnect)
- Offer both digital and print promotional materials (some customizable)
- Will work with MSL on customized training plan
- Has a dedicated marketing rep and training rep on staff

A.6. Discovery, Metadata, Linking, and Branding

- Branding options for individual library accounts
- A lot of integration opportunities with SpringShare products
- Support OpenURL
- Content is available in discovery systems
- Provide MARC records that are able to be edited after download
- Can export holdings through Google Scholar
- Content is not currently discoverable in search engines

A.7. Support and Service

- 24/7 support (phone & online)
- 70% of cases resolved same day
- Robust ticketing system and online interface
- Promised a quick implementation for current Ebsco customers
- Provided a roadmap for installation of package (~10 business days)
- Status alerts page; 99% uptime

B.1. Additional Services

- Duplication of narrative already provided elsewhere

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Ebsco – Package 1 (Complete)

DATE: 5/10/2024

- Willing to discuss other integration options with Ebsco services not included in this Proposal

III. **Appendix H** – Technical Assessment Form

- Very good job answering questions or pointing to their documents for answers

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Ebsco – Package 1 (Complete)

DATE: 5/10/2024

**EVALUATION OF SECTION III
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
\$2,072,340	,	\$4,279,745	x	35 points	=	17

Evaluation Team Comments:

- 2% annual increase in cost for each of the six years.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Ebsco – Package 2 (Premier)

DATE: 5/10/2024

SUMMARY PAGE

Department Name: Maine State Library

Name of RFP Coordinator: Lori Fisher

Names of Evaluators: Heidi Cook, Beth Crist, Jenna Davis, Tim Morton, Tim Pellett, William Wheeler

<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section I. Organization Qualifications and Experience	15	15
Section II. Proposed Services and Technical Assessment	50	33
Section III. Cost Proposal	35	18
<u>Total Points</u>	<u>100</u>	<u>66</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Ebsco – Package 2 (Premier)

DATE: 5/10/2024

**EVALUATION OF SECTION I
Organization Qualifications and Experience**

	<u>Points Available</u>	<u>Points Awarded</u>
Section I. Organization Qualifications and Experience	15	15

Evaluation Team Comments:

- I. Appendix C – Qualifications & Experience Form
Have been in business for 80 years and providing database content since 1995 – extensive experience
Relevant/comparable experience provided (RI, KY, CT)
Was a long tenured provider for Maine, and works with many libraries individually 3,000 employees worldwide (breakdown would have been useful)
- II. Subcontractors
Specifically stated that subcontractors will not be used for this proposed service. Implies they do use subcontractors elsewhere.
Mentions using sub-processors – how is that different than sub-contractors?
- III. Organizational Chart
Provided as requested.
Detailed who among leadership would be involved with this contract
Included contact information for key personnel
- IV. Litigation
No litigation disclosed.
- V. Licensure/Certification (none required)
Included ISO27001 certificate
- VI. Certificate of Insurance
Provided as requested.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Ebsco – Package 2 (Premier)

DATE: 5/10/2024

**EVALUATION OF SECTION II
Proposed Services and Technical Assessment**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services and Technical Assessment	50	33

Evaluation Team Comments:

I. Appendix F – Proposed Content Template

Comprehensive overview:

- Easy to navigate their submitted Appendix F – package differences clearly noted, excellent overview chart provided
- Most package differences were in the academic resources (Elite package has four times less academic resources than Complete package)
- Consistent indexing and metadata across all packages is a positive
- Many of the databases include extensive eBook resources; publication dates are within the last few years
- Explanation of how new concepts are added and terms are assigned - very helpful
- Integration with digital learning environments – exceeds expectations
- Strict vetting process indicates a high degree of vigilance around what is included in these databases
- Transparency throughout document about limitations of the various databases
- References specific aspects of non-K-12 resources which address Maine Learning Results
- Distributed access to over 20,000 reference and nonfiction ebooks throughout the content areas (so specific RFP content area for Reference eBooks/Resources was not included as a separate database entry)

A.1. Scope of Services to be Provided: Content

a. General Interest Resources

- Generally met minimum RFP content area requirements.
- Magazines include full-text New Yorker, Atlantic Monthly, and NY Review of Books

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Ebsco – Package 2 (Premier)

DATE: 5/10/2024

- For LegallInfo – rely heavily on NOLO press; eBooks are recently published; question about whether these resources are provided through NOLO as a third party? Is that true for the legal forms?
- Acknowledged limitations – auto repair source does not include video, for example
- Well-rounded selection of databases for this content area

b. Newspapers

- Generally met minimum RFP content area requirements
- Includes 5 major Maine newspapers
- Unclear how quickly these issues are available through this resource – generally said updates daily but not specific that all content is updated daily
- Seems like 75% of content includes inactive (not currently published) titles
- Global publications included
- Question: statement “Newspaper Source Plus does not include any images or video content” seems to conflict with “Newspaper Source Plus also includes 2 million images” – was second sentence “images” supposed to be “audio”?

c. Readers Advisory

- Exceeds minimum RFP content area requirements.
- Narrative melded the two resources (K-8, Novelist Plus) so it was hard to differentiate
- More than 25 librarians on staff for these two resources – positive
- “created by librarians, for librarians”
- Over 17,000 audio book samples (useful)
- Description of search limiters was very comprehensive and not dependent on an algorithm
- Robust support materials
- These resources has been the leading industry reader’s advisory tool

d. PreK-12 Resources

- Exceeds minimum RFP content area requirements
- Great integration with all major learning management systems
- Well integrated with Google Classroom (Partner with Google for Education)
- Literary Reference Plus includes full text of many classic works
- Program for emerging readers seems to be an excellent add-on to RFP requirements
- Science reference includes experiments (Are those 3D?)

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Ebsco – Package 2 (Premier)

DATE: 5/10/2024

- Also includes a K-8 ebook collection of 950 titles (simultaneous use?)
- Included substantial resources for educators themselves
- Ebook collections for K-12 resources quite robust and up-to-date

e. Academic Resources

- Package 2 generally meets RFP content requirements
- Package 2 is half of the academic content of Package 1
- Business Source Premier has applicability to the Small Business and General content areas
- Includes Engineering Source
- High school students use these resources extensively

f. Small Business Resources

- In combination with Academic resources in both Packages 1 & 2 clearly meets the RFP requirements for this category
- In combination with Academic resources in Package 1, this category exceeds the RFP requirements for this content area
- Small Business Sources has eBook selection
- So easy to see that one resource is more “how-to” and the other resource focuses on research
- Accel5 business books summaries & videos is a unique resource

g. Reference eBooks/ Resources

Embedded this content throughout other content area descriptions

h. Career, College, & Workforce Building Skills

- Exceeds minimum RFP content area requirements
- Extensive variety of exam prep options
- Materials in this content area 4th grade through adult (wide scope)
- Due to previous experience with exam prep materials through Learning Express may have loading delay which means users have previous outdated version of exam, not accurate updated version. Is that lag time still there?

B. Scope of Services – Additional Content Resources

- Provided six additional content resources as complimentary but they are already freely available on the Internet (within this package is convenience for user)
- Most are index-only resources (not full-text resources)

II. **Appendix G** – Response to Proposed Services For Part II, Scope of Services to be Provided

STATE OF MAINE TEAM CONSENSUS EVALUATION NOTES

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Ebsco – Package 2 (Premier)

DATE: 5/10/2024

A.1. Content

- Description of discounts available to current subscribers of these resources
- Built in curation control for individual libraries (not just at state level)
- Individual libraries can choose to show only full-text and turn of abstract & indexing
- Good overview of how they curate all of their content
- Expressed a willingness to adjust package further during contract phase
- Majority of subject matter experts have Master's degrees aligning with the content areas
- Made trial available to evaluation team

A.2. Interface

- Explora interface for K-12 students, and a public library version
- Detailed language support (31 languages) and accessibility functionality (text-to-speech)
- Transparent about what they can't do (ex. RSS)
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- Does integrate with Google and Microsoft products
- Bookmarking is very easy for records/searches
- Many of the pdfs are original text; some are html text download (where color photos, maps, etc. were listed but not included in pdf). [reference full text definition in RFP] Example in History Reference Source – archaeology
- Search on lexile number or age group – very useful in Explora
- Do not integrate with e-reserve systems (must be done manually) – nice that they pointed that out
- In trial, could not get to MAS complete outside of Explora
- In trial, did search with multiple databases, selected one to look at, and could not get back to original database selection

A.3. Authentication

- Support variety of options EZproxy, OpenAthens
- Provides geo-authentication only for their products
- Does not provide the authentication system DML has in place now (geo-authentication of all resources in DML, not just one vendor resources)

A.4. Statistics and Reporting

- Variety of options including consortia level

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Ebsco – Package 2 (Premier)

DATE: 5/10/2024

- Auto repair resource & MyHeritage – need to email to request stats because third-party resource
- Offers SUSHI and COUNTER5
- Library-specific reports won't be available unless library has a separate account

A.5. Training and Marketing

- Six online customized trainings per year included (seems low given Maine needs)
- Did not provide pricing for additional training requests
- No in-person training offered
- Does offer Ebsco Academy free, on-demand training videos
- Robust support web site (EbscoConnect)
- Offer both digital and print promotional materials (some customizable)
- Will work with MSL on customized training plan
- Has a dedicated marketing rep and training rep on staff

A.6. Discovery, Metadata, Linking, and Branding

- Branding options for individual library accounts
- A lot of integration opportunities with SpringShare products
- Support OpenURL
- Content is available in discovery systems
- Provide MARC records that are able to be edited after download
- Can export holdings through Google Scholar
- Content is not currently discoverable in search engines

A.7. Support and Service

- 24/7 support (phone & online)
- 70% of cases resolved same day
- Robust ticketing system and online interface
- Promised a quick implementation for current Ebsco customers
- Provided a roadmap for installation of package (~10 business days)
- Status alerts page; 99% uptime

B.1. Additional Services

- Duplication of narrative already provided elsewhere
- Willing to discuss other integration options with Ebsco services not included in this Proposal

III. Appendix H – Technical Assessment Form

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Ebsco – Package 2 (Premier)

DATE: 5/10/2024

- Very good job answering questions or pointing to their documents for answers

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Ebsco – Package 2 (Premier)

DATE: 5/10/2024

**EVALUATION OF SECTION III
Cost Proposal**

Lowest Submitted Cost Proposal		Cost Proposal Being Scored	x	Score Weight	=	Score
\$2,072,340	,	\$4,002,652	x	35 points	=	18

Evaluation Team Comments:

- 3% annual increase in cost for each of the six years.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Ebsco – Package 3 (Elite)

DATE: 5/10/2024

SUMMARY PAGE

Department Name: Maine State Library

Name of RFP Coordinator: Lori Fisher

Names of Evaluators: Heidi Cook, Beth Crist, Jenna Davis, Tim Morton, Tim Pellett, William Wheeler

<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section I. Organization Qualifications and Experience	15	15
Section II. Proposed Services and Technical Assessment	50	31
Section III. Cost Proposal	35	20
<u>Total Points</u>	<u>100</u>	<u>66</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Ebsco – Package 3 (Elite)

DATE: 5/10/2024

**EVALUATION OF SECTION I
Organization Qualifications and Experience**

	<u>Points Available</u>	<u>Points Awarded</u>
Section I. Organization Qualifications and Experience	15	15

Evaluation Team Comments:

- I. Appendix C – Qualifications & Experience Form
Have been in business for 80 years and providing database content since 1995 – extensive experience
Relevant/comparable experience provided (RI, KY, CT)
Was a long tenured provider for Maine, and works with many libraries individually 3,000 employees worldwide (breakdown would have been useful)
- II. Subcontractors
Specifically stated that subcontractors will not be used for this proposed service. Implies they do use subcontractors elsewhere.
Mentions using sub-processors – how is that different than sub-contractors?
- III. Organizational Chart
Provided as requested.
Detailed who among leadership would be involved with this contract
Included contact information for key personnel
- IV. Litigation
No litigation to disclose.
- V. Licensure/Certification (none required)
Included ISO27001 certificate
- VI. Certificate of Insurance
Provided as requested.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Ebsco – Package 3 (Elite)

DATE: 5/10/2024

**EVALUATION OF SECTION II
Proposed Services and Technical Assessment**

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Proposed Services and Technical Assessment	50	31

Evaluation Team Comments:

I. **Appendix F – Proposed Content Template**

Comprehensive overview:

- Easy to navigate their submitted Appendix F – package differences clearly noted, excellent overview chart provided
- Most package differences were in the academic resources (Elite package has four times less academic resources than Complete package)
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TEAM CONSENSUS EVALUATION NOTES**

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DATE: 5/10/2024

- For LegallInfo – rely heavily on NOLO press; eBooks are recently published; question about whether these resources are provided through NOLO as a third party? Is that true for the legal forms?
- Acknowledged limitations – auto repair source does not include video, for example
- Well-rounded selection of databases for this content area

b. Newspapers

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- These resources has been the leading industry reader’s advisory tool

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TEAM CONSENSUS EVALUATION NOTES**

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DATE: 5/10/2024

- Also includes a K-8 ebook collection of 950 titles (simultaneous use?)
- Included substantial resources for educators themselves
- Ebook collections for K-12 resources quite robust and up-to-date
- ReadIT database does have an ELL collection at three levels (can be used for younger readers as well)

e. Academic Resources

- Generally meets RFP content requirements
- Package 3 is ¼ of the academic content of Package 1(pg117)
- High school students use these resources extensively

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- Generally meets the RFP requirements for this category
- Small Business Sources has eBook selection
- So easy to see that one resource is more “how-to” and the other resource focuses on research
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II. **Appendix G** – Response to Proposed Services For Part II, Scope of Services to be Provided

A.1. Content

- Description of discounts available to current subscribers of these resources

STATE OF MAINE TEAM CONSENSUS EVALUATION NOTES

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DATE: 5/10/2024

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- Search on lexile number or age group – very useful in Explora
- Do not integrate with e-reserve systems (must be done manually) – nice that they pointed that out

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- Support variety of options EZproxy, OpenAthens
- Provides geo-authentication only for their products
- Does not provide the authentication system DML has in place now (geo-authentication of all resources in DML, not just one vendor resources)

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- Variety of options including consortia level
- Auto repair resource – need to email to request stats because third-party resource
- Offers SUSHI and COUNTER5
- Library-specific reports won't be available unless library has a separate account

A.5. Training and Marketing

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Ebsco – Package 3 (Elite)

DATE: 5/10/2024

- Six online customized trainings per year included (seems low given Maine needs)
- Did not provide pricing for additional training requests
- No in-person training offered
- Does offer Ebsco Academy free, on-demand training videos
- Robust support web site (EbscoConnect)
- Offer both digital and print promotional materials (some customizable)
- Will work with MSL on customized training plan
- Has a dedicated marketing rep and training rep on staff

A.6. Discovery, Metadata, Linking, and Branding

- Branding options for individual library accounts
- A lot of integration opportunities with SpringShare products
- Support OpenURL
- Content is available in discovery systems
- Provide MARC records that are able to be edited after download
- Can export holdings through Google Scholar
- Content is not currently discoverable in search engines

A.7. Support and Service

- 24/7 support (phone & online)
- 70% of cases resolved same day
- Robust ticketing system and online interface
- Promised a quick implementation for current Ebsco customers
- Provided a roadmap for installation of package (~10 business days)
- Status alerts page; 99% uptime

B.1. Additional Services

- Duplication of narrative already provided elsewhere
- Willing to discuss other integration options with Ebsco services not included in this Proposal

III. Appendix H – Technical Assessment Form

- Very good job answering questions or pointing to their documents for answers

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: Ebsco – Package 3 (Elite)

DATE: 5/10/2024

**EVALUATION OF SECTION III
Cost Proposal**

Lowest Submitted Cost Proposal		Cost Proposal Being Scored	x	Score Weight	=	Score
\$2,072,340		\$3,540,807	x	35 points	=	20

Evaluation Team Comments:

- 3% annual increase in cost for each of the six years.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: World Book – Package 1 (Students, Kids, Advanced, etc.)

DATE: 5/10/2024

SUMMARY PAGE

Department Name: Maine State Library

Name of RFP Coordinator: Lori Fisher

Names of Evaluators: Heidi Cook, Beth Crist, Jenna Davis, Tim Morton, Tim Pellett, William Wheeler

<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section I. Organization Qualifications and Experience	15	N/A
Section II. Proposed Services and Technical Assessment	50	N/A
Section III. Cost Proposal	35	N/A
<u>Total Points</u>	<u>100</u>	<u>N/A</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: World Book – Package 1 (Students, Kids, Advanced, etc.)

DATE: 5/10/2024

**EVALUATION OF SECTION I
Organization Qualifications and Experience**

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section I. Organization Qualifications and Experience	15	N/A

Evaluation Team Comments:

All evaluators agreed that this bidder does not have the qualifications to offer multiple database products across multiple subject areas. The bid was rejected and not scored.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: World Book – Package 1 (Students, Kids, Advanced, etc.)

DATE: 5/10/2024

**EVALUATION OF SECTION II
Proposed Services and Technical Assessment**

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section II. Proposed Services and Technical Assessment	50	N/A

Evaluation Team Comments:

The evaluation team all agreed that the bidder was unable to respond to over 88% of the proposed services, and as such the bid was not scored.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: World Book – Package 1 (Students, Kids, Advanced, etc.)

DATE: 5/10/2024

**EVALUATION OF SECTION III
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
\$2,072,340	,	N/A rejected	x	35 points	=	N/A

Evaluation Team Comments:

Cost was not evaluated.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: World Book – Package 2 (eBooks World Book titles)

DATE: 5/10/2024

SUMMARY PAGE

Department Name: Maine State Library

Name of RFP Coordinator: Lori Fisher

Names of Evaluators: Heidi Cook, Beth Crist, Jenna Davis, Tim Morton, Tim Pellett, William Wheeler

<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section I. Organization Qualifications and Experience	15	N/A
Section II. Proposed Services and Technical Assessment	50	N/A
Section III. Cost Proposal	35	N/A
<u>Total Points</u>	<u>100</u>	<u>N/A</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: World Book – Package 2 (eBooks World Book titles)

DATE: 5/10/2024

**EVALUATION OF SECTION
Organization Qualifications and Experience**

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section I. Organization Qualifications and Experience	15	N/A

Evaluation Team Comments:

All evaluators agreed that this bidder does not have the qualifications to offer multiple database products across multiple subject areas. The bid was rejected and not scored.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: World Book – Package 2 (eBooks World Book titles)

DATE: 5/10/2024

**EVALUATION OF SECTION II
Proposed Services and Technical Assessment**

	<u>Points Availabl e</u>	<u>Points Awarde d</u>
Section II. Proposed Services and Technical Assessment	50	N/A

Evaluation Team Comments:

The evaluation team all agreed that the bidder was unable to respond to over 88% of the requested database content, and as such the bid was rejected and not scored.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER: World Book – Package 2 (eBooks World Book titles)

DATE: 5/10/2024

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	,	Cost Proposal Being Scored	x	Score Weight	=	Score
\$2,072,340	,	N/A rejected	x	35 points	=	N/A

Evaluation Team Comments:

Cost was not evaluated.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc., Gale Package #1

DATE: May 8, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

File 1 – Preliminary Information

- I. **Appendix A – Cover Page**
Submitted as required: Y

- II. **Appendix B – Debarment, Performance, and Non-Collusion Certification Form**
Submitted as required: Y

File 2 – Organization Qualifications & Experience

- I. **Appendix C – Qualifications & Experience Form**
 - Highly qualified. Provide service to most states and some in Canada, with 40 consortia contracts. In business for 68 years.
 - Highly authoritative partners
 - Has won many national industry accolades
 - Continuous improvement through usability studies and librarian and user surveys
 - Provides the current service to Maine, including geoauthentication for all of DML
 - Highly qualified staff

- II. Subcontractors
No mention of subcontractors

- III. Organizational Chart
Provided as required, appears adequate

- IV. Litigation
No mention of litigation in proposal though it is required

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc., Gale Package #1

DATE: May 8, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

- V. Licensure/Certification (none required)
Document proving legality of doing business in Maine provided

- VI. Certificate of Insurance
Provided as required, appears adequate.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

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BIDDER NAME: Cengage Learning, Inc., Gale Package #1

DATE: May 8, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

File 3 – Proposed Services and Technical Assessment

I. **Appendix F** – Proposed Content Template

A.1. Scope of Services to be Provided: Content

- Comprehensive comments:
 - For educators, lesson plans, tip sheets, scavenger hunts, tutorials, and webinars are available
 - Many products integrate with Microsoft Office 365, Gmail, Classroom, Drive, Docs, and more—a plus
 - Consistent metadata and indexing across all databases—a plus
 - The proposal is good for general public and K12 resources, lacking for academic use
 - Fairly low full text access in general

a. General Interest Resources

Heavy on literature resources

Overall meets RFP requirements for general interest resources

- Chiltons
 - Car repair manuals and 2500+ how to videos and animations
 - Useful for all auto repair experience levels
 - Useful Automotive Service Excellence (ASE) quizzes for vocational programs
 - Updated continuously
 - The industry standard
- Gale General OneFile and OneFile Subject Collections
 - General interest periodical resource
 - “Much” of the content is full text
 - Includes reference, newspaper, audio, magazine and journal content, with 14,000 titles
 - Includes extensive business resources
 - Searchable NPR transcripts
 - Wide ranging topics of general and academic interest
- Health and Wellness
 - Comprehensive consumer health resource
 - Content added daily

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc., Gale Package #1

DATE: May 8, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

- Full-text articles from medical journals, pamphlets, newsletters, periodicals, newspapers, and magazines. Also contains reference ebooks, streaming video, and streaming audio resources
- Includes “several” Spanish language resources
- Legal Forms
 - Legal forms, articles, questions and answers, and directory information
 - State forms checked for changes monthly. All forms checked at least annually.
 - Question on how this resource is curated
- Literature Resource Center
 - eBooks, articles, book reviews, primary sources
 - 175,000 writers covered
 - Appropriate for popular, high school and academic usage
 - Lots of biographical info on authors
 - Comprehensive
- Literature: Scribner Writer Series
 - Focus on classic “most studied” literature and important authors in the literary canon
 - Appropriate for popular, high school and academic usage
 - eBooks and original scholarly essays on authors
 - Fixed, closed content; nothing new is added, and nothing is revised
- Literature: Twayne's Author Series
 - Seems very similar to Scribner, with addition of focus on literary movements and genres
 - Appropriate for popular, high school and academic usage
 - eBooks, articles, book reviews
- OneFile: Informe Academico
 - Wide range of full-text Spanish- and Portuguese-language scholarly journals, newspapers, reference works and magazines from and about Latin America
 - Not translations but works originally written in Spanish and Portuguese

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: May 8, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

- General public; K-12 (Upper Middle and High School grades 8-12); Academic

b. Newspapers

- OneFile: News
 - Access to local, state, national and global newspapers, also radio and tv news broadcasts
 - Maine coverage is extremely limited, including only the main Bangor and Portland papers
 - 3,866 titles, with 2,811 full text

c. Readers Advisory

- Books and Authors
 - What are the qualifications of the “hand-picked genre experts”?
 - General public; K-12 (Middle, High School); Academic
 - Audience selector tool includes children, young adults, adults
 - Updated regularly with author bio info and book reviews
 - Visual search option
 - Focus on diverse books is a plus
 - Not as robust as other readers advisory tools

d. Prek-12 Resources

Meets the RFP requirements for Prek-12 students and educators.

- In Context: Elementary, Environmental Studies, High School, Middle School, Opposing Viewpoints
 - Interfaces designed appropriately for the different age groups
 - Content is age appropriate for each school level
 - Designed to help students become familiar with research
 - Gale eBooks and National Geographic Kids content integrate into In Context: Elementary to increase discovery and research success
 - Magazine, newspaper, multimedia, and reference content. Includes maps, creative content, audio, primary docs
 - Updates up to 4 times/day
 - In Context: Environmental useful for all ages
 - In Context: Opposing Viewpoints covers current social issues. Includes informed, differing views. Useful for all ages
- OneFile: Educator's Reference Complete, High School Edition

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

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DATE: May 8, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

- Resources for teachers of all grades and most subjects, as well as for education students. Includes education admin and policy resources.
- 1,300 periodicals, newspapers, multimedia, reference

- Nat Geo Kids
 - Maps, eBooks, magazine content, lots of multimedia
 - Visual, fun, easy to navigate interface
 - Elementary and middle school kids

- e. Academic Resources

Overall, these resources are not robust for the academic environment. Low percentage of full text and peer reviewed content. Coverage areas are just adequate. There is no business resource included.

 - OneFile: Health Sciences Research Collection
 - Supports Nursing and Allied health coursework
 - Covers Health, Medicine, Nursing, Physical Therapy, Psychology
 - Students, knowledgeable consumer health researchers, and healthcare professionals
 - 3,000 embargo-free, full-text periodicals, reference books, pamphlets, and over 1,200 videos
 - Full-text titles cited in CINAHL supporting specialized care, treatment, and patient management
 - Journals, magazines, newspapers, reference, multimedia

 - Gale In Context: College
 - interdisciplinary content that reinforces the development of skills such as critical thinking, problem-solving, communication, collaboration, creativity, and innovation. Includes humanities and social sciences, literature, science, U.S. history, and world history
 - mobile responsive design
 - rich with images, audio and video, including archival works

 - Gale Academic OneFile: Select
 - This option appears to pull resources available in the umbrella OneFile into subject-specific components for more efficient and effective searching.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

- There is apparently no new content in the Select option, just an option to organize it more specifically
 - In Context: Environmental Studies, Opposing Viewpoints and Science, Interactive: Science, and Educator's Reference Complete: see comments in PreK-12 Resources
 - Literature Resource Center, Scribner Writer Series, and Twayne's Author Series: see comments in General Interest Resources
- f. Small Business Resources
Does not meet RFP requirements
- Gale Business: Entrepreneurship
 - Business plan handbook series, eBooks, periodicals, glossary of business terms
 - Useful mainly for business owners, some crossover for academic use
- g. Reference eBooks/ Resources
- Gale eBooks General Reference
 - Fully mobile responsive platform
 - Reference, nonfiction and monographs
 - Citing a LJ award from 2012 is not relevant
 - 50 access only titles
 - MSL can select them from a limited list annually
 - Gale Literature: Scribner Writers Series and Twayne's Author Series (eBooks): see comments in General Interest Resources
- h. Career, College, & Workforce Building Skills
Does not meet minimum requirements
- ChiltonLibrary: see comments in General Interest Resources
 - Gale OneFile: Educator's Reference Complete: see comments in PreK-12 Resources

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

B. Scope of Services – Additional Content Resources

N/A

II. **Appendix G** – Response to Proposed Services Form

Part II, Scope of Services to be Provided

A.1. Content

- Flexible package is a plus
- Prorated credits provided to libraries already subscribed to databases—a plus

A.2. Interface

- One File and inContext meet all interface descriptions specified in RFP
- Strong capabilities for viewing results lists and individual records in multiple ways
- Gale Power Search platform allows users to search across multiple resources and eliminates duplicate results
- Users can print and email single records with no restrictions
- Works well with multiple citation management tools
- Strong integration options with common course management systems and course reserve systems
- Strong integration capabilities with local library systems and discovery vendors
- Supports Open URL
- Provides KBART-compliant metadata
- Provides MARC-21 compliant records for named databases and Ebooks content that include RDA elements
- Multiple ways that users may create alerts and share content
- Provides a mobile app
- Provides search interfaces for K-5 students, middle school, high school, undergrads, university researchers, and adult consumers
- Robust language tools. Provides translation tools for 50 languages in most resources. Some of the languages are available in text to speech format too.
- “Many” resources offer text to speech capabilities
- Predictive search assistance.
- No restrictions on multiple copies/use
- Committed to meeting WCAG. VPATs are provided.
- Lexile level searching capability is a plus
- PDF does not capture original article but rather text only
- Permalinks work well

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

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DATE: May 8, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

A.3. Authentication

- Works with EZProxy and other proxy services
- Provides Remote Patron Authentication Services
- Convenient single sign on option allows for one sign in to use all Gale products in the package
- Since 2018, has provided DML's customized geoauthentication service
- Provides authentication for authorized users outside of Maine
- Proven capability of providing DML's authentication needs, a significant plus

A.4. Statistics and Reporting

- COUNTER 5 and SUSHI compliant
- Usage reports available in multiple formats and provides a usage dashboard for state level consortia
- Along with standard reporting which is robust, vendor will work with clients to provide customized reports based on needs
- Can provide stats for state as a whole, individual libraries, library types, and individual resources for any time period

A.5. Training and Marketing

- Works with clients to create a customized training plan. Training options include multiple formats.
- 5 days onsite training and 12 virtual training sessions per year included in pricing. Additional training available for a fee. Many asynchronous options available, included in pricing.
- Use feedback from clients to improve training
- Works with clients to create a customized marketing plan, which includes promoting the value of libraries to the community. Will provide a custom support portal page.
- Provide a range of customizable marketing materials

A.6. Discovery, Metadata, Linking, and Branding

- Widgets, title lists, icons, and MARC records are provided
- Geo Links provided for individual libraries
- Many customization options are available for both DML and individual libraries, including branding, local links, subsets of resources, and more
- MARC records can be customized

A.7. Support and Service

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

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DATE: May 8, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

- Strong customer service ethos
- In the last year, 99.77% availability. Longest outage was 1 ¾ hours
- Technical staff on duty 24/7/365
- Plenty of lead time for both planned maintenance and changes to the products.
- Actively and continuously collects and assesses user and library satisfaction in a variety of ways
- Search and accessibility upgrades planned in 2025
- Provides a highly detailed, thorough implementation plan and timeline

B.1. Additional Services

- Geoauthentication services work very well for DML, a big plus
- Gale Pages are a highly useful feature for school and public libraries. It is well supported. This is a big plus.
- Support portal
- Usage dashboard
- Usage reviews
- Cross searching platforms
- Online learning portal

III. Appendix H – Technical Assessment Form

- Minimal answer about data compliance
- Use AWS, which is very secure
- Meets info security standards
- Cloud service and NIST requirements—minimal information, though not required

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc. - Package 1

DATE: May 8, 2024

EVALUATOR NAME: Heidi Cook

EVALUATOR DEPARTMENT: RSU5/Freeport High School)

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

File 1 – Preliminary Information

- I. **Appendix A – Cover Page**
Submitted as required: Y/N
Yes
- II. **Appendix B – Debarment, Performance, and Non-Collusion Certification Form**
Submitted as required: Y/N
Yes

File 2 – Organization Qualifications & Experience

- I. **Appendix C – Qualifications & Experience Form**
Currently MSL's primary statewide provider (P)
Proven track record w MSL
Works with over 40 states/provinces
- II. Subcontractors
I don't see this (Q)
- III. Organizational Chart
Yes-limited
- IV. Litigation
I don't see this (Q)
- V. Licensure/Certification (none required)
Yes
- VI. Certificate of Insurance
Yes

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc. - Package 1

DATE: May 8, 2024

EVALUATOR NAME: Heidi Cook

EVALUATOR DEPARTMENT: RSU5/Freeport High School)

File 3 – Proposed Services and Technical Assessment

I. **Appendix F** – Proposed Content Template

A.1. Scope of Services to be Provided: Content

a. General Interest Resources

Yes

b. Newspapers

Yes

c. Readers Advisory

Yes

d. Prek-12 Resources

Yes: extensive

e. Academic Resources

yes (some repetition in list: Gale in Context: college listed 3x in column)

f. Small Business Resources

yes

g. Reference eBooks/ Resources

yes

h. Career, College, & Workforce Building Skills

yes

B. Scope of Services – Additional Content Resources

Extensive descriptions of each resource (P)

LC subject headings used (P)

Strong K-12 integration & alignment to Maine Learning results where applicable (P)

Metrics included (attachment 1 for titles & coverage, etc)

Are percentages of full-text titles in collections truly full-text by our definition? (Q)

“The complete text (including graphics, e.g. images, pictures, charts) of each referenced article is available for online viewing, printing, or downloading. If two (2) or more images/charts per issue appear in the print version, but are omitted from the online version due to legal reasons, the publication will not be considered full-text.”

eBooks: “Gale eBooks content is fixed, dependent on the titles chosen for inclusion. State Library can refresh or swap-out 50 titles annually at the time of renewal with a list of approved titles provided by Gale.” Would this be every 2 years for MSL? (Q)

II. **Appendix G** – Response to Proposed Services Form

Part II, Scope of Services to be Provided

A.1. Content

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc. - Package 1

DATE: May 8, 2024

EVALUATOR NAME: Heidi Cook

EVALUATOR DEPARTMENT: RSU5/Freeport High School)

MSL may add or remove items from the bundle and pricing will be changed accordingly (P)

“Gale will identify and automatically cancel the individual subscriptions for the products included in the new contract, calculate the credit due and contact the institutions involved to ascertain the disposition of the credits. Customers may use credits at face value to pay an outstanding Gale invoice and license or purchase new Gale products” (P)

page 2: Gale database local control option tool: “allows customer institution to immediately remove an article and/or remove an entire publication from view in all Gale databases at that institution.”(I)

Is this only at state level? i.e. not at individual sites (Q)

A.2. Interface

1. a Default can be set to Advanced for many resources (P)

Is this at site or state level? (Q)

b “Search assist” and “did you mean?” for search support/assist (P)

c. Multiple search modes. (P)

includes “I Wonder...” for elementary and Visualization of search results with Topic Finder tool

e. Many Gale databases support Lexile level searching (P)

f. Robust search features, including Boolean, truncation, wildcards (P)

g. Pre (and post) search limiters (P)

2 a.Didn’t address default sort basis (N)

a.Variety of sort options depending on database

b. Post search options are available: vary by database

c. Able to share search histories (P)

d. Only 2 databases support batch marking and downloading of records: others support display, print, email, and sharing of single records. (N)

3. PowerSearch eliminates duplicates (P)

User can select which databases to include in search (P)

4. PDF available as download option. is this in all databases? In some cases, PDF of original publication (with images, charts, and diagrams) and other times PDF of text only (i.e., converted from HTML)

No indication in results of when original scanned PDF is available. (N)

Trial indicated that some files are machine-generated PDFs: At top of downloaded OneFile record “Disclaimer: This is a machine generated PDF of selected content from our products. This functionality is provided solely for your convenience and is in no way intended to replace original scanned PDF.”

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

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EVALUATOR DEPARTMENT: RSU5/Freeport High School)

Ability to save directly to Google Drive/Classroom and Microsoft OneDrive is addressed below under course management integration, but is also a valuable output option (P)

Only HTML text versions savable to Google & OneDrive apparently, even when original content PDF exists for download
lely for your convenience and is in no way intended to replace original scanned PDF.”

5. Four common citation formats supported as well as robust citation management compatibility, including RIS file format.(P)

6. True integration with Google Drive [and classroom] and Microsoft OneDrive (P)

7. “Get Link” permalink feature discussed as tool for electronic reserves

8. Answered completely (P)

9. Answered completely (P)

10. Answered completely. Links to resources work without authentication. Prompted for authentication when user tries to further interact with resource. (P)

11. Built on mobile responsive framework. (P)

Access My Library mobile app available

12. Varied search interfaces for different user groups (P)

13. Many languages available through translation tools in many of the Gale product families: product interface and Document levels via print, and also via text-to-speech audio for many languages (for text-based/HTML content only).

Some databases support interface translation only

LegalForms contains many Spanish language forms (P)

14. ReadSpeaker function on many Gale resources. Works in many languages. (P)

15. ADA compliant and always evolving. Supports variety of display options. (P)

16. Wide variety of help options (P)

A.3. Authentication

1. Robust! (P)

supports single sign on (SSO) (P)

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc. - Package 1

DATE: May 8, 2024

EVALUATOR NAME: Heidi Cook

EVALUATOR DEPARTMENT: RSU5/Freeport High School)

[Would SSO be available for students? non-RFP specific question]

2. Geo Authentication and IP Authentication (P)
3. Willing and able & has track record (P)
4. Geo authentication used at Title, article, and topic/results set levels
5. "Geo Links" available to all ME libraries
6. Robust & have more options available
7. Infrastructure currently in place and ready to move forward with enhancements(P)
8. This is currently in place

A.4. Statistics and Reporting

1. Robust report options available: COUNTER reports/SUSHI usage reports compliant customization available
2. all reporting levels can be met (statewide, library type, and library site)
3. Time intervals: monthly reports generated regularly
Usage reports available on demand (monthly reports available first week of following month)

A.5. Training and Marketing

- 1a all formats of training supported
- 1b live on-site, virtual training (live & prerecorded) and training support materials.
Most document-based materials can be customized
Custom support site
New materials added continuously
Many samples provided in links
- 1c Five (5) days on-site training per contract year & up to 12 virtual session per contract year.
- 1d. additional on-site days: \$3750/per day (Would this be 2-3 hours?) (Q)
additional virtual training: \$400/per session (30-60 minute)
- 1e. short videos and tip sheets for end users are readily available online (P)
- 1f. yes: in training sessions and at "Gale support roundtables"

2a most materials support this

2 b. multi-channel marketing

custom support portal: widgets, communication templates, social media-ready marketing as well as traditional print materials

Robust Marketing team & tools

PR toolkit

**STATE OF MAINE
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EVALUATOR DEPARTMENT: RSU5/Freeport High School)

A.6. Discovery, Metadata, Linking, and Branding

1 Widgets, Icons/descriptions/links, MARC records/Title Lists
Geo Links

AML Access My Library mobile app

2 “Gale resources can be customized by MSL, its member libraries and/or by Gale as may be preferred. Gale’s Admin permits member libraries (if they choose) to modify their account settings to meet their needs, including [wide variety of options]. (P)

3. Statewide branding available. Custom institution branding also available. (P)

4. OK

5. MARC records available to customize and download
Ex Libris

A.7. Support and Service

1. highest level

2. 99.77% availability

9. Detailed Gale Implementation Plan included as separate file

B.1. Additional Services

Gale Pages (P)

DML support portal (P)

Usage dashboard (P)

Usage reviews (P)

III. **Appendix H** – Technical Assessment Form

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning Inc. – Package 1

DATE: May 9, 2024

EVALUATOR NAME: Jenna Davis

EVALUATOR DEPARTMENT: Maine State Library

Instructions: *The purpose of this form is to record proposal review notes written by individual evaluators for this Request for Proposals (RFP) process. It is required that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

File 1 – Preliminary Information

- I. **Appendix A – Cover Page**
Submitted as required: *Yes*

- II. **Appendix B – Debarment, Performance, and Non-Collusion Certification Form**
Submitted as required: *Yes*

File 2 – Organization Qualifications & Experience

- I. **Appendix C – Qualifications & Experience Form**
Comprehensive provider serving over 40 states and provinces.

- II. Subcontractors
Not listed.

- III. Organizational Chart
Yes; in Appendix C narrative.

- IV. Litigation
Not listed.

- V. Licensure/Certification (none required)
Yes.

- VI. Certificate of Insurance
Yes.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning Inc. – Package 1

DATE: May 9, 2024

EVALUATOR NAME: Jenna Davis

EVALUATOR DEPARTMENT: Maine State Library

File 3 – Proposed Services and Technical Assessment

I. **Appendix F** – Proposed Content Template

A.1. Scope of Services to be Provided: Content

a. General Interest Resources

Good diversity of sources. Especially like seeing OneFile and LegalForms.

b. Newspapers

OneFile: News.

c. Readers Advisory

Includes Gale Books and Authors.

d. Prek-12 Resources

Wide array of offerings for many age groups. Includes Educator's Reference Complete. Citation integration.

e. Academic Resources

Includes Academic OneFile: Select and Health Sciences Research Collection. Collections are robust, generally with no embargoes. Could have more here.

f. Small Business Resources

Package includes Gale Business: Entrepreneurship. Could use more research-related content in this area.

g. Reference eBooks/ Resources

Includes Gale eBooks General Reference as well as ebook offerings.

h. Career, College, & Workforce Building Skills

ChiltonLibrary; potential use for both professional training and personal development. Per vendor: "While there are no Maine curriculum standards around car repairs, ChiltonLibrary would be a valuable tool for a variety of career and technical education programs." Gale General OneFile & OneFile Subject Collections do include this subject matter but are listed under General Interest. Would like to see more content in this area.

B. Scope of Services – Additional Content Resources

None noted.

II. **Appendix G** – Response to Proposed Services Form

Part II, Scope of Services to be Provided

A.1. Content

Flexible with packages offerings. Per vendor: "Databases can be added or removed from the proposed bundle packages upon request." Will prorate.

A.2. Interface

Default basic search, can be sent to advanced at site level. Provides search support/suggest functionality, including search assist. Gale Power Search available when searching multiple databases. No copy restrictions. Citation support. LMS

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INDIVIDUAL EVALUATION NOTES**

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RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning Inc. – Package 1

DATE: May 9, 2024

EVALUATOR NAME: Jenna Davis

EVALUATOR DEPARTMENT: Maine State Library

integration support. Integrates with discovery (EDS, etc). Search alerts & advanced search functions. Robust translation tools. Detailed examples (with graphics) provided.

A.3. Authentication

Works with EZ Proxy as well as several other authentication services. Offers single sign-on. Can IP authenticate and provides geo location. Has worked to provide services for Digital Maine Library and is familiar with our needs.

A.4. Statistics and Reporting

Provide standardized, comprehensive reports. May be requested via email or accessed using an admin dashboard. On-demand and/or delivered via email once per month. Detailed graphics showing interface. List of available data elements.

A.5. Training and Marketing

Detailed document provided separately discussing implementation timeline. Appendix G outlines robust training plan, including outreach activities.

A.6. Discovery, Metadata, Linking, and Branding

Customizable widgets, links, etc. Support open URL. Flexible with customization and branding.

A.7. Support and Service

Dedicated consortia staff. 99.77% system availability over the last 12 months. Maintenance planned during times of lower user impact. Detailed plan and response.

B.1. Additional Services

Overall comprehensive response. Did add GalePages, support portal, usage services.

III. Appendix H – Technical Assessment Form
Review by Bill Wheeler.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc. – Package 1

DATE: May 7, 2024

EVALUATOR NAME: Tim Morton

EVALUATOR DEPARTMENT: Bowdoin College

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department’s RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

File 1 – Preliminary Information

- I. **Appendix A – Cover Page**
Submitted as required: Y
- Appendix B – Debarment, Performance, and Non-Collusion Certification Form**
Submitted as required: Y

File 2 – Organization Qualifications & Experience

- I. **Appendix C – Qualifications & Experience Form**
 - I – current MSL database provider
 - P – agreements with 40+ states/provinces
 - P – significant contacts with other publishers, libraries, content producers
 - P – experience/staffing to provide support
- II. Subcontractors
Not answered
- III. Organizational Chart
Included in section I above and complete
- IV. Litigation
Not answered
- V. Licensure/Certification (none required)
Provided
- VI. Certificate of Insurance
Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Tim Morton

EVALUATOR DEPARTMENT: Bowdoin College

File 3 – Proposed Services and Technical Assessment

I. **Appendix F** – Proposed Content Template

A.1. Scope of Services to be Provided: Content

Common to all sections

P – consistent indexing across products

P – frequent product updates

P – integration with LMS and other systems

P – integrated citation tools

a. General Interest Resources

ChiltonLibrary

P – usable by multiple constituent groups (p.3)

I – commonality with industry resources (p.4)

Gale General OneFile and Subject Collections

Q – what is the relationship between General and Subjects?

Q – is this a single offer or pick and choose subjects?

I – 22,801 titles, but only 13,393 are full-text

P – low % of embargoed titles (p.12)

Gale Health and Wellness

P – mix of journal and reference content (p.15-16)

I – 1,752 titles

N – large % of OA titles (p.17)

P – low % of embargoed titles (p.18)

Q – how is out-of-date content removal handled?

Gale LegalForms - State of Maine

Q – who created the forms?

Q – liability for errors in forms?

Q – how many are available elsewhere?

Gale Literature Resource Center

I – 4,150 titles, but only 529 are full-text

P – broad global, genre, and temporal coverage (p.24)

P – low % of embargoed titles (p.26)

Gale Literature: Scribner Writer Series

P – covers the traditional English-language author canon (p.29)

I – titles details not in indicated attachment

Gale Literature: Twayne's Author Series

Q – overlap of authors in Scribner?

P – features world authors (p.32)

Gale OneFile: Informe Academico

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Tim Morton

EVALUATOR DEPARTMENT: Bowdoin College

P – Spanish and Portuguese content (p.36)

I – 1,307 titles

N – large % of OA titles (p.38)

Q – average backfile size of 113 years? (p.38)

Q – is the described indexing also multilingual?

b. Newspapers

Gale OneFile: News

I – 3,866 newspaper titles

P – low % of embargoed titles (p.43)

I – 2 ME newspapers

c. Readers Advisory

Gale Books and Authors

P – intentional diversity and inclusion efforts for content

P – serves multiple constituent groups

d. Prek-12 Resources

Gale in Context: Elementary

I – serves grades K-5

P – multiple content types/subjects (p.50)

Q – Default indexing blurb, custom indexing for kids?

Gale in Context: Environmental Studies

I – 1,034 titles

P – low % of embargoed titles (p.57)

Gale in Context: High School

I – 2,368 titles

P – low % of embargoed titles

P – topic-based discovery (p.61)

Gale in Context: Middle School

P – topic-based discovery (p.66-67)

I – 1,441 titles

P – low % of embargoed titles (p.69)

Gale in Context: Opposing Viewpoints

P – multiple, opposing perspectives (p.72)

P – coverage of popular sociopolitical issues (p.72)

N – Only 60% full-text titles (p.74)

P – Almost no embargoed titles (p.75)

Gale OneFile: Educator's Reference Complete

I – focus on educators rather than students (p.90)

P – full-text of ERIC content (p.91)

I – 1,324 titles

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Tim Morton

EVALUATOR DEPARTMENT: Bowdoin College

N – only 66% full-text titles

P – low % of embargoed titles

Gale OneFile: High School Edition

I – general database with a variety of subjects/content types

I – 1,997 titles

P – low % of embargoed titles

Gale Presents: National Geographic Kids

I – complete run of Nat Geo Kids from 2009-Present

P – supplementary book and multimedia content

e. Academic Resources

Gale OneFile: Health Sciences Research Collection

I – grouping of 4 health science topical collections

I – 6,573 titles

N – 65% full-text titles

P – low % of embargoed titles

Q – policies on removing outdated medical information?

Gale in Context: College

I/P – interdisciplinary, multi-format collection (p.113)

I – 2,368 titles

P – low % of embargoed titles (p.116)

Gale Academic OneFile: Select

I – their largest, general-interest resource (30 subject collections)

I – 28,121 titles

P – low % of embargoed titles (p.125)

Gale in Context: Environmental Studies

I – 1,034 titles

P – low % of embargoed titles

Gale in Context: Opposing Viewpoints

P – multiple, opposing perspectives

P – coverage of popular sociopolitical issues

N – Only 60% full-text titles

P – Almost no embargoed titles

Gale Literature Resource Center

I – 4,150 titles, but only 529 are full-text

P – broad global, genre, and temporal coverage

P – low % of embargoed titles

Gale Literature: Scribner Writer Series

P – covers the traditional English-language author canon

I – titles details not in indicated attachment

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: Bowdoin College

Gale Literature: Twayne's Author Series

Q – overlap of authors in Scribner?

P – features world authors

Gale OneFile: Educator's Reference Complete

I – focus on educators rather than students

P – full-text of ERIC content

I – 1,324 titles

N – only 66% full-text titles

P – low % of embargoed titles

f. Small Business Resources

Gale Business: Entrepreneurship

P/Q – sample business plans (unique content?)

I – 654 titles

P – low % of embargoed titles (p.189)

g. Reference eBooks/ Resources

Gale eBooks General Reference

I – selection of 50 titles to be selected by MSL

N – no credit/alternate titles for libraries that own them

N/Q – header mentions annual hosting fee, but no information?

Gale Literature: Scribner Writers Series (eBooks)

Q – different than main Scribner entry?

Gale Literature: Twayne's Author Series (eBooks)

Q – different than main Twayne's entry?

h. Career, College, & Workforce Building Skills

ChiltonLibrary

P – usable by multiple constituent groups

I – commonality with industry resources

Gale OneFile: Educator's Reference Complete

I – focus on educators rather than students

P – full-text of ERIC content

I – 1,324 titles

N – only 66% full-text titles

P – low % of embargoed titles

B. Scope of Services – Additional Content Resources

Nothing submitted

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: Bowdoin College

- II. **Appendix G** – Response to Proposed Services Form
Part II, Scope of Services to be Provided
- A.1. Content
- P – can add/remove database from proposed list
 - P – prorated credits for libraries that subscribe individually
 - P – trial already running
- A.2. Interface
- P – meets all functionality in A.2.1
 - P – search by content level/lexile
 - P cross-database search capability (A.2.3)
 - P – printing/exporting of content and citations (A.2.4 and A.2.5)
 - P – integration with LMS and other systems (A.2.6 and A.2.7 and A.2.8)
 - P – customized search interfaces for K-12 students (A.2.12)
 - Q – how are translations performed? (A.2.13)
 - P – ADA compliant and VPATs provided (A.2.15)
- A.3. Authentication
- P – multiple authentication options, including geoauthentication
 - P – currently providing this service in Maine
- A.4. Statistics and Reporting
- P – stats are COUNTER and SUSHI compliant
 - P – data available at statewide and institutional levels
- A.5. Training and Marketing
- P – plan for training within 30 days of award in variety of formats
 - N – max of 5 on-site and 12 virtual trainings per year
 - P – custom marketing support portal
- A.6. Discovery, Metadata, Linking, and Branding
- P – individual libraries can customize interfaces, etc
 - P – allows for library branding
 - I – one-time setup for linking out
 - P/Q – MARC records provided, records via Alma and other systems? (A.6.6)
- A.7. Support and Service
- N – incomplete answer to support section A.7.1
 - P – longest outage in last year was <2 hours (A.7.2)
 - P – outline of coming enhancements (A.7.6)
 - N – incomplete answer to MSL feedback section A.7.8
 - P – streamlined implementation as their currently providing this content (A.7.9)
- B.1. Additional Services
- P – customizable Gale portals available for each library
 - P – custom support portal for MSL

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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BIDDER NAME: Cengage Learning, Inc. – Package 1

DATE: May 7, 2024

EVALUATOR NAME: Tim Morton

EVALUATOR DEPARTMENT: Bowdoin College

- III. **Appendix H** – Technical Assessment Form
They appear to meet state IT requirements
VPATs provided for products

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc. Package 1

DATE: 5/9/2024

EVALUATOR NAME: Tim Pellett

EVALUATOR DEPARTMENT: Maine InfoNet

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

File 1 – Preliminary Information

- I. **Appendix A – Cover Page**
Submitted as required:

- II. **Appendix B – Debarment, Performance, and Non-Collusion Certification Form**
Submitted as required:

File 2 – Organization Qualifications & Experience

- I. **Appendix C – Qualifications & Experience Form**
 - Has been in business for over 68 years.
 - Extensive experience working with large consortia.
 - Extensive experience working with all library types.
 - Proven track record as a current customer of this bidder.

- II. Subcontractors
 - Did not submit ??

- III. Organizational Chart
 - Submitted meets RFP requirements

- IV. Litigation
 - Did not submit ??

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc. Package 1

DATE: 5/9/2024

EVALUATOR NAME: Tim Pellett

EVALUATOR DEPARTMENT: Maine InfoNet

- V. Licensure/Certification (none required)
 - Submitted meets RFP requirements

- VI. Certificate of Insurance
 - Submitted meets RFP requirements.

File 3 – Proposed Services and Technical Assessment

I. **Appendix F** – Proposed Content Template

A.1. Scope of Services to be Provided: Content

Package 1

a. General Interest Resources

- Resources are comprehensive for the average library patron

b. Newspapers

- Only 2 Maine newspapers
- Depth of content limited
- Meets minimal requirements

c. Readers Advisory

- Meets minimal requirements
- Not a robust resource

d. Prek-12 Resources

- Extensive array of resources
- Meets minimum requirements

e. Academic Resources

- Minimum requirements met.
- Academics need to supplement with other resources.

f. Small Business Resources

- Does NOT satisfy RFP requirements – missing demographics, business/company listings

g. Reference eBooks/ Resources

- Not many options
- Publication dates are old
- Does not meet RFP requirements

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: Maine InfoNet

h. Career, College, & Workforce Building Skills

- Only has Chilton's car repair - does not meet minimum requirements

B. Scope of Services – Additional Content Resources

- nothing submitted

II. Appendix G – Response to Proposed Services Form

Part II, Scope of Services to be Provided

A.1. Content

- Will automatically identify preexisting subscriptions by library and provide credit.

- Tools in place to address content issues

- Provided trial information including access to training center to view webinars, tutorials, LibGuides, professional development etc.

A.2. Interface

- Robust search interface (keyword/title, advanced, publication)

- Browse by discipline, topic finder

- Lexile level filter

- Robust advanced search commands and qualifiers

- Can save and share search history

- Mark, display, print, email, share records from result set

- Power Search interface to cross search most databases

- Articles in HTML and PDF format

- MP3 downloads allowed

- Robust options for citation options and exports

- Integrates with Google Classroom, Microsoft 365, BrightSpace etc

- No restrictions on multiple copies of digital and print content.

- Integration with Discovery systems – EDS, Primo, Summon etc

- Supports OpenURL

- Shared links do not require authentication

- Mobile app that uses geo authentication

- Multiple interface option for different grade levels

- Content translates to over 50 languages

A.3. Authentication

- Supports many auth systems including EZProxy (IP), SAML, LDAP, NCIP, OpenAthens plus more.

- Provides robust geo-authentication that integrates into existing authentication

- Geo auth works with most providers, not just Gale's.

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc. Package 1

DATE: 5/9/2024

EVALUATOR NAME: Tim Pellett

EVALUATOR DEPARTMENT: Maine InfoNet

- Currently use Gale's geo-auth since 2018 and have made nice modifications since then, including geo auth on a journal and article level.
- Customized admin interface to manage resources, Ips etc.
- Customized interface provides detailed geo auth usage
- Geo auth also available to all libraries.

A.4. Statistics and Reporting

- Robust usage reports available in multiple formats
- Offers COUNTER 5 reports and non-COUNTER reports
- Also provides a separate robust usage dashboard for consortia
- Provides SUSHI service

A.5. Training and Marketing

- Currently provides a robust support website dedicated to Maine with training and marketing materials and much more.
- Robust training options in a variety of formats, live and recorded webinars, tutorials
- Support for both administrative and general staff.
- Ongoing training
- Provides social media, newsletter, email content
- Provides lesson plans, projects and scavenger hunts for K-12 students
- Database specific resource guides, tip sheets, tutorials and recorded webinars
- Five days of on-site training available
- Marketing materials can be customized with library logo and URL for posters, bookmarks etc.
- Dedicated training and marketing websites for Maine.

A.6. Discovery, Metadata, Linking, and Branding

- Custom branding for each library account

A.7. Support and Service

- Dedicated CSRs for individual libraries based on library type
- Robust admin console with many customizations to manage auth settings, branding/linking, open URL, marc record download, more.
- Dedicated consortia level support, bypassing level 1 techs (if mentioned in RFP)
- Content indexed in Google Scholar and other search engines.
- 99.77% uptime
- Current status website for outages
- Robust network/platform for infrastructure and connectivity

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 5/9/2024

EVALUATOR NAME: Tim Pellett

EVALUATOR DEPARTMENT: Maine InfoNet

B.1. Additional Services

- III. **Appendix H** – Technical Assessment Form
- See notes from Bill Wheeler, State OIT liaison for this RFP.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc.

DATE: May 10, 2024

EVALUATOR NAME: William Wheeler

EVALUATOR DEPARTMENT: Maine Office of Information Technology

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

While I participated in the meetings, I left the application evaluation to those that are familiar with the library and knew what they needed in the application. I felt I could add very little to this part of the process. I did evaluate Appendix H and my notes for that are below.

File 1 – Preliminary Information

- I. **Appendix A – Cover Page**
Submitted as required: Y/N
Yes

- II. **Appendix B – Debarment, Performance, and Non-Collusion Certification Form**
Submitted as required: Y/N
Yes

File 2 – Organization Qualifications & Experience

- I. **Appendix C – Qualifications & Experience Form**
Provided

- II. Subcontractors

- III. Organizational Chart
Provided

- IV. Litigation

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

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EVALUATOR NAME: William Wheeler

EVALUATOR DEPARTMENT: Maine Office of Information Technology

V. Licensure/Certification (none required)

VI. Certificate of Insurance
 Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: Maine Office of Information Technology

File 3 – Proposed Services and Technical Assessment

I. **Appendix F** – Proposed Content Template

I am not familiar with the State Library, their needs, or whether what was proposed was sufficient. I left the assessment of these areas to those members that could make a far better determination than myself.

A.1. Scope of Services to be Provided: Content

- a. General Interest Resources
- b. Newspapers
- c. Readers Advisory
- d. Prek-12 Resources
- e. Academic Resources
- f. Small Business Resources
- g. Reference eBooks/ Resources
- h. Career, College, & Workforce Building Skills

B. Scope of Services – Additional Content Resources

II. **Appendix G** – Response to Proposed Services Form

I am not familiar with the State Library, their needs, or whether what was proposed was sufficient. I left the assessment of these areas to those members that could make a far better determination than myself.

Part II, Scope of Services to be Provided

- A.1. Content
- A.2. Interface
- A.3. Authentication
- A.4. Statistics and Reporting
- A.5. Training and Marketing
- A.6. Discovery, Metadata, Linking, and Branding
- A.7. Support and Service
- B.1. Additional Services

III. **Appendix H** – Technical Assessment Form

While Cengage did answer the Data Compliance, Non-Functional Requirements, and Security Standards tabs of the Appendix H document, they failed to provide any detailed description to the Cloud Services or NIST requirements tabs and only indicated that “Yes”, they comply.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc.

DATE: May 10, 2024

EVALUATOR NAME: William Wheeler

EVALUATOR DEPARTMENT: Maine Office of Information Technology

They provided no real description on the Data Compliance tab and only stated that they would supply that information as needed.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc., Gale Package #2

DATE: May 8, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

Instructions: *The purpose of this form is to record proposal review notes written by individual evaluators for this Request for Proposals (RFP) process. It is required that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

File 1 – Preliminary Information

- I. **Appendix A – Cover Page**
Submitted as required: Y

- II. **Appendix B – Debarment, Performance, and Non-Collusion Certification Form**
Submitted as required: Y

File 2 – Organization Qualifications & Experience

- I. **Appendix C – Qualifications & Experience Form**
 - Highly qualified. Provide service to most states and some in Canada, with 40 consortia contracts. In business for 68 years.
 - Highly authoritative partners
 - Has won many national industry accolades
 - Continuous improvement through usability studies and librarian and user surveys
 - Provides the current service to Maine, including geoauthentication for all of DML
 - Highly qualified staff

- II. Subcontractors
No mention of subcontractors

- III. Organizational Chart
Provided as required, appears adequate

- IV. Litigation
No mention of litigation in proposal though it is required

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc., Gale Package #2

DATE: May 8, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

- V. Licensure/Certification (none required)
Document proving legality of doing business in Maine provided

- VI. Certificate of Insurance
Provided as required, appears adequate.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc., Gale Package #2

DATE: May 8, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

File 3 – Proposed Services and Technical Assessment

I. **Appendix F** – Proposed Content Template

A.1. Scope of Services to be Provided: Content

- Comprehensive comments:
 - For educators, lesson plans, tip sheets, scavenger hunts, tutorials, and webinars are available
 - Many products integrate with Microsoft Office 365, Gmail, Classroom, Drive, Docs, and more—a plus
 - Consistent metadata and indexing across all databases—a plus
 - The proposal is strong for general public and K12 resources, lacking for academic use
 - Fairly low full text access in general

- a. General Interest Resources
 - Heavy on literature resources
 - Overall meets RFP requirements for general interest resources

 - Chiltons
 - Car repair manuals and 2500+ how to videos and animations
 - Useful for all auto repair experience levels
 - Useful Automotive Service Excellence (ASE) quizzes for vocational programs
 - Updated continuously
 - The industry standard

 - Gale General OneFile and OneFile Subject Collections
 - General interest periodical resource
 - “Much” of the content is full text
 - Includes reference, newspaper, audio, magazine and journal content, with 14,000 titles
 - Includes extensive business resources
 - Searchable NPR transcripts
 - Wide ranging topics of general and academic interest

 - Health and Wellness
 - Comprehensive consumer health resource
 - Content added daily

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc., Gale Package #2

DATE: May 8, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

- Full-text articles from medical journals, pamphlets, newsletters, periodicals, newspapers, and magazines. Also contains reference ebooks, streaming video, and streaming audio resources
- Includes “several” Spanish language resources
- Legal Forms
 - Legal forms, articles, questions and answers, and directory information
 - State forms checked for changes monthly. All forms checked at least annually.
 - Question on how this resource is curated
- Literature Resource Center
 - eBooks, articles, book reviews, primary sources
 - 175,000 writers covered
 - Appropriate for popular, high school and academic usage
 - Lots of biographical info on authors
 - Comprehensive
- Literature: Scribner Writer Series
 - Focus on classic “most studied” literature and important authors in the literary canon
 - Appropriate for popular, high school and academic usage
 - eBooks and original scholarly essays on authors
 - Fixed, closed content; nothing new is added, and nothing is revised
- Literature: Twayne's Author Series
 - Seems very similar to Scribner, with addition of focus on literary movements and genres
 - Appropriate for popular, high school and academic usage
 - eBooks, articles, book reviews
- OneFile: Informe Academico
 - Wide range of full-text Spanish- and Portuguese-language scholarly journals, newspapers, reference works and magazines from and about Latin America
 - Not translations but works originally written in Spanish and Portuguese

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc., Gale Package #2

DATE: May 8, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

- General public; K-12 (Upper Middle and High School grades 8-12); Academic

b. Newspapers

- OneFile: News
 - Access to local, state, national and global newspapers, also radio and tv news broadcasts
 - Maine coverage is extremely limited, including only the main Bangor and Portland papers
 - 3,866 titles, with 2,811 full text

c. Readers Advisory

- Books and Authors
 - What are the qualifications of the “hand-picked genre experts”?
 - General public; K-12 (Middle, High School); Academic
 - Audience selector tool includes children, young adults, adults
 - Updated regularly with author bio info and book reviews
 - Visual search option
 - Focus on diverse books is a plus
 - Not as robust as other readers advisory tools

d. Prek-12 Resources

Meets the RFP requirements for Prek-12 students and educators.

- In Context: Elementary, Environmental Studies, High School, Middle School, Opposing Viewpoints
 - Interfaces designed appropriately for the different age groups
 - Content is age appropriate for each school level
 - Designed to help students become familiar with research
 - Gale eBooks and National Geographic Kids content integrate into In Context: Elementary to increase discovery and research success
 - Magazine, newspaper, multimedia, and reference content. Includes maps, creative content, audio, primary docs
 - Updates up to 4 times/day
 - In Context: Environmental useful for all ages
 - In Context: Opposing Viewpoints covers current social issues. Includes informed, differing views. Useful for all ages
- OneFile: Educator's Reference Complete, High School Edition

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc., Gale Package #2

DATE: May 8, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

- Resources for teachers of all grades and most subjects, as well as for education students. Includes education admin and policy resources.
- 1,300 periodicals, newspapers, multimedia, reference

- Nat Geo Kids
 - Maps, eBooks, magazine content, lots of multimedia
 - Visual, fun, easy to navigate interface
 - Elementary and middle school kids

- e. Academic Resources

While this section meets the minimal RFP requirements, overall, these resources are not robust for the academic environment. Low percentage of full text and peer reviewed content. Coverage areas are just adequate.

 - OneFile: Health Sciences Research Collection
 - Supports Nursing and Allied health coursework
 - Covers Health, Medicine, Nursing, Physical Therapy, Psychology
 - Students, knowledgeable consumer health researchers, and healthcare professionals
 - 3,000 embargo-free, full-text periodicals, reference books, pamphlets, and over 1,200 videos
 - Full-text titles cited in CINAHL supporting specialized care, treatment, and patient management
 - Journals, magazines, newspapers, reference, multimedia

 - Gale In Context: College
 - interdisciplinary content that reinforces the development of skills such as critical thinking, problem-solving, communication, collaboration, creativity, and innovation. Includes humanities and social sciences, literature, science, U.S. history, and world history
 - mobile responsive design
 - rich with images, audio and video, including archival works

 - Gale Academic OneFile: Select
 - This option appears to pull resources available in the umbrella OneFile into subject-specific components for more efficient and effective searching.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc., Gale Package #2

DATE: May 8, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

- There is apparently no new content in the Select option, just an option to organize it more specifically
 - Gale Business: Insights
 - Comprehensive international business resources
 - 522,000 detailed company profiles with company financial data, in-depth country overviews, and comprehensive industry profiles
 - Useful for budding entrepreneurs, small business owners, financial planners, and established business professionals. Also has academic uses for business management, economics, finance, marketing.
 - Cross listed with Small Business Resources
 - Company financials, market research, 522,000 company profiles, many industry reports, UN and World Bank country profiles
 - In Context: Environmental Studies, Opposing Viewpoints and Science, Interactive: Science, and Educator's Reference Complete: see comments in PreK-12 Resources
 - Literature Resource Center, Scribner Writer Series, and Twayne's Author Series: see comments in General Interest Resources
- f. Small Business Resources
Meets RFP requirements
- Gale Business: Entrepreneurship
 - Business plan handbook series, eBooks, periodicals, glossary of business terms
 - Useful mainly for business owners, some crossover for academic use
 - Gale Business: Insights: see comments in Academic Resources
- g. Reference eBooks/ Resources
- Gale eBooks General Reference
 - Fully mobile responsive platform
 - Reference, nonfiction and monographs
 - Citing a LJ award from 2012 is not relevant

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc., Gale Package #2

DATE: May 8, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

- 50 access only titles
- MSL can select titles from a limited list annually

- Gale Literature: Scribner Writers Series and Twayne's Author Series (eBooks): see comments in General Interest Resources

- h. Career, College, & Workforce Building Skills
Meets minimum requirements
 - ChiltonLibrary: see comments in General Interest Resources

 - Gale OneFile: Educator's Reference Complete: see comments in PreK-12 Resources

 - Gale Presents: Peterson's Test and Career Prep
 - Useful prep resources for a variety of scholastic, career, and citizenship exams
 - College and career research tools
 - Current awards
 - Resume and cover letter builder

B. Scope of Services – Additional Content Resources

N/A

II. **Appendix G** – Response to Proposed Services Form

Part II, Scope of Services to be Provided

A.1. Content

- Flexible package is a plus
- Prorated credits provided to libraries already subscribed to databases—a plus

A.2. Interface

- One File and inContext meet all interface descriptions specified in RFP
- Strong capabilities for viewing results lists and individual records in multiple ways
- Gale Power Search platform allows users to search across multiple resources and eliminates duplicate results
- Users can print and email single records with no restrictions
- Works well with multiple citation management tools

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc., Gale Package #2

DATE: May 8, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

- Strong integration options with common course management systems and course reserve systems
- Strong integration capabilities with local library systems and discovery vendors
- Supports Open URL
- Provides KBART-compliant metadata
- Provides MARC-21 compliant records for named databases and Ebooks content that include RDA elements
- Multiple ways that users may create alerts and share content
- Provides a mobile app
- Provides search interfaces for K-5 students, middle school, high school, undergrads, university researchers, and adult consumers
- Robust language tools. Provides translation tools for 50 languages in most resources. Some of the languages are available in text to speech format too.
- “Many” resources offer text to speech capabilities
- Predictive search assistance.
- No restrictions on multiple copies/use
- Committed to meeting WCAG. VPATs are provided.
- Lexile level searching capability is a plus
- PDF does not capture original article but rather text only
- Permalinks work well

A.3. Authentication

- Works with EZProxy and other proxy services
- Provides Remote Patron Authentication Services
- Convenient single sign on option allows for one sign in to use all Gale products in the package
- Since 2018, has provided DML’s customized geoauthentication service
- Provides authentication for authorized users outside of Maine
- Proven capability of providing DML’s authentication needs, a significant plus

A.4. Statistics and Reporting

- COUNTER 5 and SUSHI compliant
- Usage reports available in multiple formats and provides a usage dashboard for state level consortia
- Along with standard reporting which is robust, vendor will work with clients to provide customized reports based on needs

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc., Gale Package #2

DATE: May 8, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

- Can provide stats for state as a whole, individual libraries, library types, and individual resources for any time period

A.5. Training and Marketing

- Works with clients to create a customized training plan. Training options include multiple formats.
- 5 days onsite training and 12 virtual training sessions per year included in pricing. Additional training available for a fee. Many asynchronous options available, included in pricing.
- Use feedback from clients to improve training
- Works with clients to create a customized marketing plan, which includes promoting the value of libraries to the community. Will provide a custom support portal page.
- Provide a range of customizable marketing materials

A.6. Discovery, Metadata, Linking, and Branding

- Widgets, title lists, icons, and MARC records are provided
- Geo Links provided for individual libraries
- Many customization options are available for both DML and individual libraries, including branding, local links, subsets of resources, and more
- MARC records can be customized

A.7. Support and Service

- Strong customer service ethos
- In the last year, 99.77% availability. Longest outage was 1 ¾ hours
- Technical staff on duty 24/7/365
- Plenty of lead time for both planned maintenance and changes to the products.
- Actively and continuously collects and assesses user and library satisfaction in a variety of ways
- Search and accessibility upgrades planned in 2025
- Provides a highly detailed, thorough implementation plan and timeline

B.1. Additional Services

- Geoauthentication services work very well for DML, a big plus
- Gale Pages are a highly useful feature for school and public libraries. It is well supported. This is a big plus.
- Support portal
- Usage dashboard
- Usage reviews

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc., Gale Package #2

DATE: May 8, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

- Cross searching platforms
- Online learning portal

III. **Appendix H** – Technical Assessment Form

- Minimal answer about data compliance
- Use AWS, which is very secure
- Meets info security standards
- Cloud service and NIST requirements—minimal information, though not required

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc. - Package 2

DATE: May 8, 2024

EVALUATOR NAME: [Heidi Cook](#)

EVALUATOR DEPARTMENT: RSU5/Freeport High School)

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

File 1 – Preliminary Information

- I. **Appendix A – Cover Page**
Submitted as required: Y/N
Yes
- II. **Appendix B – Debarment, Performance, and Non-Collusion Certification Form**
Submitted as required: Y/N
Yes

File 2 – Organization Qualifications & Experience

- I. **Appendix C – Qualifications & Experience Form**
Currently MSL's primary statewide provider (P)
Proven track record w MSL
Works with over 40 states/provinces
- II. Subcontractors
I don't see this (Q)
- III. Organizational Chart
Yes-limited
- IV. Litigation
I don't see this (Q)
- V. Licensure/Certification (none required)
Yes
- VI. Certificate of Insurance
Yes

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc. - Package 2

DATE: May 8, 2024

EVALUATOR NAME: [Heidi Cook](#)

EVALUATOR DEPARTMENT: RSU5/Freeport High School)

File 3 – Proposed Services and Technical Assessment

I. **Appendix F** – Proposed Content Template

A.1. Scope of Services to be Provided: Content

a. General Interest Resources

Yes

b. Newspapers

Yes

c. Readers Advisory

Yes

d. Prek-12 Resources

Yes: extensive

e. Academic Resources

yes (some repetition in list: Gale in Context: college listed 3x in column)

f. Small Business Resources

yes

g. Reference eBooks/ Resources

yes

h. Career, College, & Workforce Building Skills

yes

B. Scope of Services – Additional Content Resources

- Extensive descriptions of each resource (P)
- LC subject headings used (P)
- Strong K-12 integration & alignment to Maine Learning results where applicable (P)
- Metrics included (attachment 1 for titles & coverage, etc)
- Are percentages of full-text titles in collections truly full-text by our definition? (Q)
- “The complete text (including graphics, e.g. images, pictures, charts) of each referenced article is available for online viewing, printing, or downloading. If two (2) or more images/charts per issue appear in the print version, but are omitted from the online version due to legal reasons, the publication will not be considered full-text.”
- Gale business: Insights: new to MSL? (Q)
- Peterson's Test and Career prep included in this package. This is a different product from what we currently have through DML, which is only career prep.
- eBooks: “Gale eBooks content is fixed, dependent on the titles chosen for inclusion. State Library can refresh or swap-out titles annually at the time of

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc. - Package 2

DATE: May 8, 2024

EVALUATOR NAME: [Heidi Cook](#)

EVALUATOR DEPARTMENT: RSU5/Freeport High School)

renewal with a list of approved titles provided by Gale.” Would this be every 2 years for MSL? (Q)

II. **Appendix G** – Response to Proposed Services Form

Part II, Scope of Services to be Provided

A.1. Content

- MSL may add or remove items from the bundle and pricing will be changed accordingly (P)
- “Gale will identify and automatically cancel the individual subscriptions for the products included in the new contract, calculate the credit due and contact the institutions involved to ascertain the disposition of the credits. Customers may use credits at face value to pay an outstanding Gale invoice and license or purchase new Gale products” (P)
- page 2: Gale database local control option tool: “allows customer institution to immediately remove an article and/or remove an entire publication from view in all Gale databases at that institution.”(I)
- Is this only at state level? i.e. not at individual sites (Q)

A.2. Interface

1. a Default can be set to Advanced for many resources (P)
Is this at site or state level? (Q)
 - b “Search assist” and “did you mean?” for search support/assist (P)
 - c. Multiple search modes. (P)
includes “I Wonder...” for elementary and Visualization of search results with Topic Finder tool
 - e. Many Gale databases support Lexile level searching (P)
 - f. Robust search features, including Boolean, truncation, wildcards (P)
 - g. Pre (and post) search limiters (P)
-
- 2 a.Didn’t address default sort basis (N)
 - a.Variety of sort options depending on database
 - b. Post search options are available: vary by database
 - c. Able to share search histories (P)
 - d. Only 2 databases support batch marking and downloading of records: others support display, print, email, and sharing of single records. (N)
 3. PowerSearch eliminates duplicates (P)
User can select which databases to include in search (P)

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc. - Package 2

DATE: May 8, 2024

EVALUATOR NAME: [Heidi Cook](#)

EVALUATOR DEPARTMENT: RSU5/Freeport High School)

4. PDF available as download option. is this in all databases? In some cases, PDF of original publication (with images, charts, and diagrams) and other times PDF of text only (i.e., converted from HTML)

No indication in results of when original scanned PDF is available. (N)

Trial indicated that some files are machine-generated PDFs: At top of downloaded OneFile record “Disclaimer: This is a machine generated PDF of selected content from our products. This functionality is provided solely for your convenience and is in no way intended to replace original scanned PDF.”

Ability to save directly to Google Drive/Classroom and Microsoft OneDrive is addressed below under course management integration, but is also a valuable output option (P)

Only HTML text versions savable to Google & OneDrive apparently, even when original content PDF exists for download

5. Four common citation formats supported as well as robust citation management compatibility, including RIS file format.(P)

6. True integration with Google Drive [and classroom] and Microsoft OneDrive (P)

7. “Get Link” permalink feature discussed as tool for electronic reserves

8. Answered completely (P)

9. Answered completely (P)

10. Answered completely. Links to resources work without authentication. Prompted for authentication when user tries to further interact with resource. (P)

11. Built on mobile responsive framework. (P)

Access My Library mobile app available

12. Varied search interfaces for different user groups (P)

13. Many languages available through translation tools in many of the Gale product families: product interface and Document levels via print, and also via text-to-speech audio for many languages (for text-based/HTML content only).

Some databases support interface translation only

LegalForms contains many Spanish language forms (P)

Peterson’s test & career prep support user interface in Spanish

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc. - Package 2

DATE: May 8, 2024

EVALUATOR NAME: [Heidi Cook](#)

EVALUATOR DEPARTMENT: RSU5/Freeport High School)

14. ReadSpeaker function on many Gale resources. Works in many languages. (P)

15. ADA compliant and always evolving. Supports variety of display options. (P)

16. Wide variety of help options (P)

A.3. Authentication

1. Robust! (P)

 supports single sign on (SSO) (P)

 [Would SSO be available for students? non-RFP specific question]

2. Geo Authentication and IP Authentication (P)

3. Willing and able & has track record (P)

4. Geo authentication used at Title, article, and topic/results set levels

5. “Geo Links” available to all ME libraries

6. Robust & have more options available

7. Infrastructure currently in place and ready to move forward with enhancements(P)

8. This is currently in place

A.4. Statistics and Reporting

1. Robust report options available: COUNTER reports/SUSHI usage reports
compliant

 customization available

2. all reporting levels can be met (statewide, library type, and library site)

3. Time intervals: monthly reports generated regularly

 Usage reports available on demand (monthly reports available first week of
 following month)

A.5. Training and Marketing

1a all formats of training supported

1b live on-site, virtual training (live & prerecorded) and training support materials.

 Most document-based materials can be customized

 Custom support site

 New materials added continuously

 Many samples provided in links

1c Five (5) days on-site training per contract year & up to 12 virtual sessions per
contract year.

1d. additional on-site days: \$3750/per day (Would this be 2-3 hours?) (Q)

 additional virtual training: \$400/per session (30-60 minute)

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

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BIDDER NAME: Cengage Learning, Inc. - Package 2

DATE: May 8, 2024

EVALUATOR NAME: [Heidi Cook](#)

EVALUATOR DEPARTMENT: RSU5/Freeport High School)

- 1e. short videos and tip sheets for end users are readily available online (P)
- 1f. yes: in training sessions and at “Gale support roundtables”

2a most materials support this

2 b. multi-channel marketing

custom support portal: widgets, communication templates, social media-ready marketing as well as traditional print materials

Robust Marketing team & tools

PR toolkit

A.6. Discovery, Metadata, Linking, and Branding

1 Widgets, Icons/descriptions/links, MARC records/Title Lists

Geo Links

AML Access My Library mobile app

2 “Gale resources can be customized by MSL, its member libraries and/or by Gale as may be preferred. Gale’s Admin permits member libraries (if they choose) to modify their account settings to meet their needs, including [wide variety of options]. (P)

3. Statewide branding available. Custom institution branding also available. (P)

4. OK

5. MARC records available to customize and download

Ex Libris

A.7. Support and Service

1. highest level

2. 99.77% availability

9. Detailed Gale Implementation Plan included as separate file

B.1. Additional Services

Gale Pages (P)

DML support portal (P)

Usage dashboard (P)

Usage reviews (P)

III. Appendix H – Technical Assessment Form

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc. - Package 2

DATE: May 9, 2024

EVALUATOR NAME: Jenna Davis

EVALUATOR DEPARTMENT: Maine State Library

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

File 1 – Preliminary Information

- I. **Appendix A – Cover Page**
Submitted as required: *Yes*

- II. **Appendix B – Debarment, Performance, and Non-Collusion Certification Form**
Submitted as required: *Yes*

File 2 – Organization Qualifications & Experience

- I. **Appendix C – Qualifications & Experience Form**
Comprehensive provider serving over 40 states and provinces.

- II. Subcontractors
Not listed.

- III. Organizational Chart
Yes; in Appendix C narrative.

- IV. Litigation
Not listed.

- V. Licensure/Certification (none required)
Yes.

- VI. Certificate of Insurance
Yes.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc. - Package 2

DATE: May 9, 2024

EVALUATOR NAME: Jenna Davis

EVALUATOR DEPARTMENT: Maine State Library

File 3 – Proposed Services and Technical Assessment

I. **Appendix F** – Proposed Content Template

A.1. Scope of Services to be Provided: Content

a. General Interest Resources

Good diversity of sources. Especially like seeing OneFile and LegalForms. OneFile: News.

c. Readers Advisory

Includes Gale Books and Authors.

d. Prek-12 Resources

Wide array of offerings for many age groups. Includes Educator's Reference Complete. Citation integration.

e. Academic Resources

Includes Academic OneFile: Select and Health Sciences Research Collection. Collections are robust, generally with no embargoes. This collection includes Gale Business: Insights.

f. Small Business Resources

Includes both Gale Business: Entrepreneurship and Gale Business: Insights.

g. Reference eBooks/ Resources

Includes Gale eBooks General Reference as well as ebook offerings.

h. Career, College, & Workforce Building Skills

Includes both ChiltonLibrary and Peterson's Test & Career Prep.

B. Scope of Services – Additional Content Resources

None noted.

II. **Appendix G** – Response to Proposed Services Form

Part II, Scope of Services to be Provided

A.1. Content

Flexible with packages offerings. Per vendor: "Databases can be added or removed from the proposed bundle packages upon request." Will prorate.

A.2. Interface

Default basic search, can be sent to advanced at site level. Provides search support/suggest functionality, including search assist. Gale Power Search available when searching multiple databases. No copy restrictions. Citation support. LMS integration support. Integrates with discovery (EDS, etc). Search alerts & advanced search functions. Robust translation tools. Detailed examples (with graphics) provided.

A.3. Authentication

**STATE OF MAINE
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DATE: May 9, 2024

EVALUATOR NAME: Jenna Davis

EVALUATOR DEPARTMENT: Maine State Library

Works with EZ Proxy as well as several other authentication services. Offers single sign-on. Can IP authenticate and provides geo location. Has worked to provide services for Digital Maine Library and is familiar with our needs.

A.4. Statistics and Reporting

Provide standardized, comprehensive reports. May be requested via email or accessed using an admin dashboard. On-demand and/or delivered via email once per month. Detailed graphics showing interface. List of available data elements.

A.5. Training and Marketing

Detailed document provided separately discussing implementation timeline. Appendix G outlines robust training plan, including outreach activities.

A.6. Discovery, Metadata, Linking, and Branding

Customizable widgets, links, etc. Support open URL. Flexible with customization and branding.

A.7. Support and Service

Dedicated consortia staff. 99.77% system availability over the last 12 months. Maintenance planned during times of lower user impact. Detailed plan and response.

B.1. Additional Services

Overall comprehensive response. Did add GalePages, support portal, usage services.

III. Appendix H – Technical Assessment Form

Review by Bill Wheeler.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc. – Package 2

DATE: May 7, 2024

EVALUATOR NAME: Tim Morton

EVALUATOR DEPARTMENT: Bowdoin College

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments: *Differences from Package 1 in italics*

File 1 – Preliminary Information

- I. **Appendix A – Cover Page**
Submitted as required: Y

- II. **Appendix B – Debarment, Performance, and Non-Collusion Certification Form**
Submitted as required: Y

File 2 – Organization Qualifications & Experience

- I. **Appendix C – Qualifications & Experience Form**
 - P – agreements with 40+ states/provinces
 - P – significant contacts with other publishers, libraries, content producers
 - P – experience/staffing to provide support

- II. Subcontractors
Not addressed

- III. Organizational Chart
Included in main overview

- IV. Litigation
Not addressed

- V. Licensure/Certification (none required)
Not required

- VI. Certificate of Insurance
Included

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc. – Package 2

DATE: May 7, 2024

EVALUATOR NAME: Tim Morton

EVALUATOR DEPARTMENT: Bowdoin College

File 3 – Proposed Services and Technical Assessment

I. **Appendix F** – Proposed Content Template

A.1. Scope of Services to be Provided: Content

Common to all sections

P – consistent indexing across products

P – frequent product updates

P – integration with LMS and other systems

P – integrated citation tools

a. General Interest Resources

ChiltonLibrary

P – usable by multiple constituent groups (p.3)

I – commonality with industry resources (p.4)

Gale General OneFile and Subject Collections

Q – what is the relationship between General and Subjects?

Q – is this a single offer or pick and choose subjects?

I – 22,801 titles, but only 13,393 are full-text

P – low % of embargoed titles (p.12)

Gale Health and Wellness

P – mix of journal and reference content (p.15-16)

I – 1,752 titles

N – large % of OA titles (p.17)

P – low % of embargoed titles (p.18)

Q – how is out-of-date content removal handled?

Gale LegalForms - State of Maine

Q – who created the forms?

Q – liability for errors in forms?

Q – how many are available elsewhere?

Gale Literature Resource Center

I – 4,150 titles, but only 529 are full-text

P – broad global, genre, and temporal coverage (p.24)

P – low % of embargoed titles (p.26)

Gale Literature: Scribner Writer Series

P – covers the traditional English-language author canon (p.29)

I – titles details not in indicated attachment

Gale Literature: Twayne's Author Series

Q – overlap of authors in Scribner?

P – features world authors (p.32)

Gale OneFile: Informe Academico

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Tim Morton

EVALUATOR DEPARTMENT: Bowdoin College

P – Spanish and Portuguese content (p.36)

I – 1,307 titles

N – large % of OA titles (p.38)

Q – average backfile size of 113 years? (p.38)

Q – is the described indexing also multilingual?

b. Newspapers

Gale OneFile: News

I – 3,866 newspaper titles

P – low % of embargoed titles (p.43)

I – 2 ME newspapers

c. Readers Advisory

Gale Books and Authors

P – intentional diversity and inclusion efforts for content

P – serves multiple constituent groups

d. Prek-12 Resources

Gale in Context: Elementary

I – serves grades K-5

P – multiple content types/subjects (p.50)

Q – Default indexing blurb, custom indexing for kids?

Gale in Context: Environmental Studies

I – 1,034 titles

P – low % of embargoed titles (p.57)

Gale in Context: High School

I – 2,368 titles

P – low % of embargoed titles

P – topic-based discovery (p.61)

Gale in Context: Middle School

P – topic-based discovery (p.66-67)

I – 1,441 titles

P – low % of embargoed titles (p.69)

Gale in Context: Opposing Viewpoints

P – multiple, opposing perspectives (p.72)

P – coverage of popular sociopolitical issues (p.72)

N – Only 60% full-text titles (p.74)

P – Almost no embargoed titles (p.75)

Gale OneFile: Educator's Reference Complete

I – focus on educators rather than students (p.90)

P – full-text of ERIC content (p.91)

I – 1,324 titles

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc. – Package 2

DATE: May 7, 2024

EVALUATOR NAME: Tim Morton

EVALUATOR DEPARTMENT: Bowdoin College

N – only 66% full-text titles

P – low % of embargoed titles

Gale OneFile: High School Edition

I – general database with a variety of subjects/content types

I – 1,997 titles

P – low % of embargoed titles

Gale Presents: National Geographic Kids

I – complete run of Nat Geo Kids from 2009-Present

P – supplementary book and multimedia content

e. Academic Resources

Gale OneFile: Health Sciences Research Collection

I – grouping of 4 health science topical collections

I – 6,573 titles

N – 65% full-text titles

P – low % of embargoed titles

Q – policies on removing outdated medical information?

Gale in Context: College

I/P – interdisciplinary, multi-format collection (p.113)

I – 2,368 titles

P – low % of embargoed titles (p.116)

Gale Academic OneFile: Select

I – their largest, general-interest resource (30 subject collections)

I – 28,121 titles

P – low % of embargoed titles (p.125)

Gale Business: Insights

I – variety of business-related content

I – 12,846 titles

I – low % of embargoed titles (p.132)

Gale in Context: Environmental Studies

I – 1,034 titles

P – low % of embargoed titles

Gale in Context: Opposing Viewpoints

P – multiple, opposing perspectives

P – coverage of popular sociopolitical issues

N – Only 60% full-text titles

P – Almost no embargoed titles

Gale Literature Resource Center

I – 4,150 titles, but only 529 are full-text

P – broad global, genre, and temporal coverage

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc. – Package 2

DATE: May 7, 2024

EVALUATOR NAME: Tim Morton

EVALUATOR DEPARTMENT: Bowdoin College

- P – low % of embargoed titles
- Gale Literature: Scribner Writer Series
 - P – covers the traditional English-language author canon
 - I – titles details not in indicated attachment
- Gale Literature: Twayne’s Author Series
 - Q – overlap of authors in Scribner?
 - P – features world authors
- Gale OneFile: Educator’s Reference Complete
 - I – focus on educators rather than students
 - P – full-text of ERIC content
 - I – 1,324 titles
 - N – only 66% full-text titles
 - P – low % of embargoed titles
- f. Small Business Resources
 - Gale Business: Entrepreneurship
 - P/Q – sample business plans (unique content?)
 - I – 654 titles
 - P – low % of embargoed titles (p.189)
 - Gale Business: Insights*
 - I – variety of business-related content*
 - I – 12,846 titles*
 - I – low % of embargoed titles*
- g. Reference eBooks/ Resources
 - Gale eBooks General Reference
 - I – selection of 50 titles to be selected by MSL
 - N – no credit/alternate titles for libraries that own them
 - N/Q – header mentions annual hosting fee, but no information?
 - Gale Literature: Scribner Writers Series (eBooks)
 - Q – different than main Scribner entry?
 - Gale Literature: Twayne’s Author Series (eBooks)
 - Q – different than main Twayne’s entry?
- h. Career, College, & Workforce Building Skills
 - ChiltonLibrary
 - P – usable by multiple constituent groups
 - I – commonality with industry resources
 - Gale OneFile: Educator’s Reference Complete
 - I – focus on educators rather than students
 - P – full-text of ERIC content
 - I – 1,324 titles

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

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DATE: May 7, 2024

EVALUATOR NAME: Tim Morton

EVALUATOR DEPARTMENT: Bowdoin College

N – only 66% full-text titles

P – low % of embargoed titles

Gale Presents: Peterson's Test and Career Prep

I – wide variety of practice tests and school searches

P – usable by multiple constituent groups

B. Scope of Services – Additional Content Resources

No entries

II. **Appendix G** – Response to Proposed Services Form

Part II, Scope of Services to be Provided

A.1. Content

P – can add/remove database from proposed list

P – prorated credits for libraries that subscribe individually

P – trial already running

A.2. Interface

P – meets all functionality in A.2.1

P – search by content level/lexile

P cross-database search capability (A.2.3)

P – printing/exporting of content and citations (A.2.4 and A.2.5)

P – integration with LMS and other systems (A.2.6 and A.2.7 and A.2.8)

P – customized search interfaces for K-12 students (A.2.12)

Q – how are translations performed? (A.2.13)

A.3. Authentication

P – multiple authentication options, including geoauthentication

P – currently providing this service in Maine

A.4. Statistics and Reporting

P – stats are COUNTER and SUSHI compliant

P – data available at statewide and institutional levels

A.5. Training and Marketing

P – plan for training within 30 days of award in variety of formats

N – max of 5 on-site and 12 virtual trainings per year

P – custom marketing support portal

A.6. Discovery, Metadata, Linking, and Branding

P – individual libraries can customize interfaces, etc

P – allows for library branding

I – one-time setup for linking out

P/Q – MARC records provided, records via Alma and other systems? (A.6.6)

A.7. Support and Service

N – incomplete answer to support section A.7.1

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: May 7, 2024

EVALUATOR NAME: Tim Morton

EVALUATOR DEPARTMENT: Bowdoin College

P – longest outage in last year was <2 hours (A.7.2)

P – outline of coming enhancements (A.7.6)

N – incomplete answer to MSL feedback section A.7.8

P – streamlined implementation as their currently providing this content (A.7.9)

B.1. Additional Services

P – customizable Gale portals available for each library

P – custom support portal for MSL

III. Appendix H – Technical Assessment Form

They appear to meet state IT requirements

Full VPATs provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc. Package 2

DATE: 5/9/2024

EVALUATOR NAME: Tim Pellett

EVALUATOR DEPARTMENT: Maine InfoNet

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

File 1 – Preliminary Information

- I. **Appendix A – Cover Page**
Submitted as required:

- II. **Appendix B – Debarment, Performance, and Non-Collusion Certification Form**
Submitted as required:

File 2 – Organization Qualifications & Experience

- I. **Appendix C – Qualifications & Experience Form**
 - Has been in business for over 68 years.
 - Extensive experience working with large consortia.
 - Extensive experience working with all library types.
 - Proven track record as a current customer of this bidder.

- II. Subcontractors
 - Did not submit ??

- III. Organizational Chart
 - Submitted meets RFP requirements

- IV. Litigation
 - Did not submit ??

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc. Package 2

DATE: 5/9/2024

EVALUATOR NAME: Tim Pellett

EVALUATOR DEPARTMENT: Maine InfoNet

- V. Licensure/Certification (none required)
 - submitted meets RFP requirements

- VI. Certificate of Insurance
 - submitted meets RFP requirements.

File 3 – Proposed Services and Technical Assessment

I. **Appendix F** – Proposed Content Template

A.1. Scope of Services to be Provided: Content

Package 2 adds Gale Business: Insights, and Peterson’s Test and Career Prep from package 1.

a. General Interest Resources

- Meets RFP requirements

b. Newspapers

- Only 2 Maine newspapers
- Depth of content limited
- Meets minimal requirements

c. Readers Advisory

- Meets RFP requirements
- Not a robust resource

d. Prek-12 Resources

- Meets RFP requirements

e. Academic Resources

- Meets RFP requirements

f. Small Business Resources

- Meets RFP requirements

g. Reference eBooks/ Resources

- Meets RFP requirements

h. Career, College, & Workforce Building Skills

- Meets RFP requirements

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: 5/9/2024

EVALUATOR NAME: Tim Pellett

EVALUATOR DEPARTMENT: Maine InfoNet

B. Scope of Services – Additional Content Resources

II. **Appendix G** – Response to Proposed Services Form

Part II, Scope of Services to be Provided

A.1. Content

- They will automatically identify preexisting subscriptions by library and provide credit.
- Tools in place to address content issues
- Provided trial information including access to training center to view webinars, tutorials, LibGuides, professional development etc.

A.2. Interface

- Robust search interface (keyword/title, advanced, publication)
- Browse by discipline, topic finder
- Lexile level filter
- Robust advanced search commands and qualifiers
- Can save and share search history
- Mark, display, print, email, share records from result set
- Power Search interface to cross search most databases
- Articles in HTML and PDF format
- MP3 downloads allowed
- Robust options for citation options and exports
- Integrates with Google Classroom, Microsoft 365, BrightSpace etc
- No restrictions on multiple copies of digital and print content.
- Integration with Discovery systems – EDS, Primo, Summon etc
- Supports OpenURL
- Shared links do not require authentication
- Mobile app that uses geo authentication
- Multiple interface option for different grade levels
- Content translates to over 50 languages

A.3. Authentication

- Supports many auth systems including EZProxy (IP), SAML, LDAP, NCIP, OpenAthens plus more.
- Provides robust geo-authentication that integrates into existing authentication
- Geo auth works with most providers, not just Gale's.

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc. Package 2

DATE: 5/9/2024

EVALUATOR NAME: Tim Pellett

EVALUATOR DEPARTMENT: Maine InfoNet

- Currently use Gale's geo-auth since 2018 and have made nice modifications since then, including geo auth on a journal and article level.
- Customized admin interface to manage resources, Ips etc.
- Customized interface provides detailed geo auth usage
- Geo auth also available to all libraries.

A.4. Statistics and Reporting

- Robust usage reports available in multiple formats
- Offers COUNTER 5 reports and non-COUNTER reports
- Also provides a separate robust usage dashboard for consortia
- Provides SUSHI service

A.5. Training and Marketing

- Currently provides a robust support website dedicated to Maine with training and marketing materials and much more.
- Robust training options in a variety of formats, live and recorded webinars, tutorials
- Support for both administrative and general staff.
- Ongoing training
- Provides social media, newsletter, email content
- Provides lesson plans, projects and scavenger hunts for K-12 students
- Database specific resource guides, tip sheets, tutorials and recorded webinars
- Five days of on-site training available
- Marketing materials can be customized with library logo and URL for posters, bookmarks etc.
- Dedicated training and marketing websites for Maine.

A.6. Discovery, Metadata, Linking, and Branding

- Custom branding for each library account

A.7. Support and Service

- Dedicated CSRs for individual libraries based on library type
- Robust admin console with many customizations to manage auth settings, branding/linking, open URL, marc record download, more.
- Dedicated consortia level support, bypassing level 1 techs (if mentioned in RFP)
- Content indexed in Google Scholar and other search engines.
- 99.77% uptime
- Current status website for outages
- Robust network/platform for infrastructure and connectivity

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

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BIDDER NAME: Cengage Learning, Inc. Package 2

DATE: 5/9/2024

EVALUATOR NAME: Tim Pellett

EVALUATOR DEPARTMENT: Maine InfoNet

B.1. Additional Services

- III. **Appendix H** – Technical Assessment Form
- See notes from Bill Wheeler, State OIT liaison for this RFP.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc.

DATE: May 10, 2024

EVALUATOR NAME: William Wheeler

EVALUATOR DEPARTMENT: Maine Office of Information Technology

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Individual Evaluator Comments:

While I participated in the meetings, I left the application evaluation to those that are familiar with the library and knew what they needed in the application. I felt I could add very little to this part of the process. I did evaluate Appendix H and my notes for that are below.

File 1 – Preliminary Information

- I. **Appendix A – Cover Page**
Submitted as required: Y/N
Yes

- II. **Appendix B – Debarment, Performance, and Non-Collusion Certification Form**
Submitted as required: Y/N
Yes

File 2 – Organization Qualifications & Experience

- I. **Appendix C – Qualifications & Experience Form**
Provided

- II. Subcontractors

- III. Organizational Chart
Provided

- IV. Litigation

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc.

DATE: May 10, 2024

EVALUATOR NAME: William Wheeler

EVALUATOR DEPARTMENT: Maine Office of Information Technology

V. Licensure/Certification (none required)

VI. Certificate of Insurance
 Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

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BIDDER NAME: Cengage Learning, Inc.

DATE: May 10, 2024

EVALUATOR NAME: William Wheeler

EVALUATOR DEPARTMENT: Maine Office of Information Technology

File 3 – Proposed Services and Technical Assessment

I. **Appendix F** – Proposed Content Template

I am not familiar with the State Library, their needs, or whether what was proposed was sufficient. I left the assessment of these areas to those members that could make a far better determination than myself.

A.1. Scope of Services to be Provided: Content

- a. General Interest Resources
- b. Newspapers
- c. Readers Advisory
- d. Prek-12 Resources
- e. Academic Resources
- f. Small Business Resources
- g. Reference eBooks/ Resources
- h. Career, College, & Workforce Building Skills

B. Scope of Services – Additional Content Resources

II. **Appendix G** – Response to Proposed Services Form

I am not familiar with the State Library, their needs, or whether what was proposed was sufficient. I left the assessment of these areas to those members that could make a far better determination than myself.

Part II, Scope of Services to be Provided

- A.1. Content
- A.2. Interface
- A.3. Authentication
- A.4. Statistics and Reporting
- A.5. Training and Marketing
- A.6. Discovery, Metadata, Linking, and Branding
- A.7. Support and Service
- B.1. Additional Services

III. **Appendix H** – Technical Assessment Form

While Cengage did answer the Data Compliance, Non-Functional Requirements, and Security Standards tabs of the Appendix H document, they failed to provide any detailed description to the Cloud Services or NIST requirements tabs and only indicated that “Yes”, they comply.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc.

DATE: May 10, 2024

EVALUATOR NAME: William Wheeler

EVALUATOR DEPARTMENT: Maine Office of Information Technology

They provided no real description on the Data Compliance tab and only stated that they would supply that information as needed.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc., Gale Package #3

DATE: May 8, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

File 1 – Preliminary Information

- I. **Appendix A – Cover Page**
Submitted as required: Y

- II. **Appendix B – Debarment, Performance, and Non-Collusion Certification Form**
Submitted as required: Y

File 2 – Organization Qualifications & Experience

- I. **Appendix C – Qualifications & Experience Form**
 - Highly qualified. Provide service to most states and some in Canada, with 40 consortia contracts. In business for 68 years.
 - Highly authoritative partners
 - Has won many national industry accolades
 - Continuous improvement through usability studies and librarian and user surveys
 - Provides the current service to Maine, including geoauthentication for all of DML
 - Highly qualified staff

- II. Subcontractors
No mention of subcontractors

- III. Organizational Chart
Provided as required, appears adequate

- IV. Litigation
No mention of litigation in proposal though it is required

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc., Gale Package #3

DATE: May 8, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

- V. Licensure/Certification (none required)
Document proving legality of doing business in Maine provided

- VI. Certificate of Insurance
Provided as required, appears adequate.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc., Gale Package #3

DATE: May 8, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

File 3 – Proposed Services and Technical Assessment

I. **Appendix F** – Proposed Content Template

A.1. Scope of Services to be Provided: Content

- Comprehensive comments:
 - For educators, lesson plans, tip sheets, scavenger hunts, tutorials, and webinars are available
 - Many products integrate with Microsoft Office 365, Gmail, Classroom, Drive, Docs, and more—a plus
 - Consistent metadata and indexing across all databases—a plus
 - The proposal is strong for general public and K12 resources, is lacking for academic use
 - Fairly low full text access in general

a. General Interest Resources

Heavy on literature resources

Overall meets RFP requirements for general interest resources

- Chiltons
 - Car repair manuals and 2500+ how to videos and animations
 - Useful for all auto repair experience levels
 - Useful Automotive Service Excellence (ASE) quizzes for vocational programs
 - Updated continuously
 - The industry standard
- Gale General OneFile and OneFile Subject Collections
 - General interest periodical resource
 - “Much” of the content is full text
 - Includes reference, newspaper, audio, magazine and journal content, with 14,000 titles
 - Includes extensive business resources
 - Searchable NPR transcripts
 - Wide ranging topics of general and academic interest
- Health and Wellness
 - Comprehensive consumer health resource
 - Content added daily

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc., Gale Package #3

DATE: May 8, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

- Full-text articles from medical journals, pamphlets, newsletters, periodicals, newspapers, and magazines. Also contains reference ebooks, streaming video, and streaming audio resources
- Includes “several” Spanish language resources
- Legal Forms
 - Legal forms, articles, questions and answers, and directory information
 - State forms checked for changes monthly. All forms checked at least annually.
 - Question on how this resource is curated
- Literature Resource Center
 - eBooks, articles, book reviews, primary sources
 - 175,000 writers covered
 - Appropriate for popular, high school and academic usage
 - Lots of biographical info on authors
 - Comprehensive
- Literature: Scribner Writer Series
 - Focus on classic “most studied” literature and important authors in the literary canon
 - Appropriate for popular, high school and academic usage
 - eBooks and original scholarly essays on authors
 - Fixed, closed content; nothing new is added, and nothing is revised
- Literature: Twayne's Author Series
 - Seems very similar to Scribner, with addition of focus on literary movements and genres
 - Appropriate for popular, high school and academic usage
 - eBooks, articles, book reviews
- OneFile: Informe Academico
 - Wide range of full-text Spanish- and Portuguese-language scholarly journals, newspapers, reference works and magazines from and about Latin America
 - Not translations but works originally written in Spanish and Portuguese

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: Maine State Library

- General public; K-12 (Upper Middle and High School grades 8-12); Academic

b. Newspapers

- OneFile: News

- Access to local, state, national and global newspapers, also radio and tv news broadcasts
- Maine coverage is extremely limited, including only the main Bangor and Portland papers
- 3,866 titles, with 2,811 full text

c. Readers Advisory

- Books and Authors

- What are the qualifications of the “hand-picked genre experts”?
- General public; K-12 (Middle, High School); Academic
- Audience selector tool includes children, young adults, adults
- Updated regularly with author bio info and book reviews
- Visual search option
- Focus on diverse books is a plus
- Not as robust as other readers advisory tools

d. Prek-12 Resources

Exceeds the RFP requirements for Prek-12 students and educators.

- In Context: Elementary, Environmental Studies, High School, Middle School, Opposing Viewpoints, Science
 - Interfaces designed appropriately for the different age groups
 - Content is age appropriate for each school level
 - Designed to help students become familiar with research
 - Gale eBooks and National Geographic Kids content integrate into In Context: Elementary to increase discovery and research success
 - Magazine, newspaper, multimedia, and reference content. Includes maps, creative content, audio, primary docs
 - Updates up to 4 times/day
 - In Context: Environmental useful for all ages
 - In Context: Opposing Viewpoints covers current social issues. Includes informed, differing views. Useful for all ages
 - In Context: Science explores how science relates to everyday life. Relevant content grouped for exploring at different levels, including academic journals. Useful for all ages. Interfaces with

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EVALUATOR DEPARTMENT: Maine State Library

Gale Interactive: Science

- Interactive: Science
 - Virtual lab simulation for middle and high school students, with 200 interactive lessons in biology, earth sciences and chemistry
 - Highly visual and interactive
 - Many educator supports to use the resource for a rich student experience
 - Includes 60 DIY 3D printing projects (thus users would need a 3D printer)
 - Great for homeschooling/remote learning
 - Nice to have but goes well beyond what's required or requested in the RFP

- OneFile: Educator's Reference Complete, High School Edition
 - Resources for teachers of all grades and most subjects, as well as for education students. Includes education admin and policy resources.
 - 1,300 periodicals, newspapers, multimedia, reference

- Gale Presents: Miss Humblebee's Academy. For ages 3-6
 - PreK-K/ages 3-6 supporting kindergarten readiness
 - Multimedia and interactive eBooks
 - Online and offline activities (offline is 40% of the content)
 - Introduces key concepts in math, science, social studies, language and literacy, art, music, social and emotional learning
 - Supports some Spanish language components
 - Appears school based/focused and not for parents to use with kids directly at home

- Nat Geo Kids
 - Maps, eBooks, magazine content, lots of multimedia
 - Visual, fun, easy to navigate interface
 - Elementary and middle school kids

- e. Academic Resources

While this section meets the minimal RFP requirements, overall, these resources are not robust for the academic environment. Low percentage of full text and peer

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EVALUATOR DEPARTMENT: Maine State Library

reviewed content. Coverage areas are just adequate.

- OneFile: Health Sciences Research Collection
 - Supports Nursing and Allied health coursework
 - Covers Health, Medicine, Nursing, Physical Therapy, Psychology
 - Students, knowledgeable consumer health researchers, and healthcare professionals
 - 3,000 embargo-free, full-text periodicals, reference books, pamphlets, and over 1,200 videos
 - Full-text titles cited in CINAHL supporting specialized care, treatment, and patient management
 - Journals, magazines, newspapers, reference, multimedia

- Gale In Context: College
 - interdisciplinary content that reinforces the development of skills such as critical thinking, problem-solving, communication, collaboration, creativity, and innovation. Includes humanities and social sciences, literature, science, U.S. history, and world history
 - mobile responsive design
 - rich with images, audio and video, including archival works

- Gale Academic OneFile: Select
 - This option appears to pull resources available in the umbrella OneFile into subject-specific components for more efficient and effective searching.
 - There is apparently no new content in the Select option, just an option to organize it more specifically

- Gale Business: Insights
 - Comprehensive international business resources
 - 522,000 detailed company profiles with company financial data, in-depth country overviews, and comprehensive industry profiles
 - Useful for budding entrepreneurs, small business owners, financial planners, and established business professionals. Also has academic uses for business management, economics, finance, marketing.
 - Cross listed with Small Business Resources
 - Company financials, market research, 522,000 company profiles, many industry reports, UN and World Bank country profiles

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- In Context: Environmental Studies, Opposing Viewpoints and Science, Interactive: Science, and Educator's Reference Complete: see comments in PreK-12 Resources
 - Literature Resource Center, Scribner Writer Series, and Twayne's Author Series: see comments in General Interest Resources
- f. Small Business Resources
- Gale Business: Entrepreneurship
 - Business plan handbook series, eBooks, periodicals, glossary of business terms
 - Useful mainly for business owners, some crossover for academic use
 - Gale Business: Insights: see comments in Academic Resources
 - Gale Business: Plan Builder
 - Step by step online business planning tool
 - Seems very useful for entrepreneurs
 - LJ's best database of 2023
 - Integrates with Legal Forms and Entrepreneurship
 - Would be very useful in Maine
- g. Reference eBooks/ Resources
- Gale eBooks General Reference
 - Fully mobile responsive platform
 - Reference, nonfiction and monographs
 - Citing a LJ award from 2012 is not relevant
 - 50 access only titles
 - MSL can select them from a limited list annually
 - Gale Literature: Scribner Writers Series and Twayne's Author Series (eBooks): see comments in General Interest Resources
- h. Career, College, & Workforce Building Skills
Meets minimum requirements
- ChiltonLibrary: see comments in General Interest Resources

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- Gale OneFile: Educator's Reference Complete: see comments in PreK-12 Resources

- Gale Presents: Peterson's Test and Career Prep
 - Useful prep resources for a variety of scholastic, career, and citizenship exams
 - College and career research tools
 - Current awards
 - Resume and cover letter builder

B. Scope of Services – Additional Content Resources

N/A

II. **Appendix G** – Response to Proposed Services Form

Part II, Scope of Services to be Provided

A.1. Content

- Flexible package is a plus
- Prorated credits provided to libraries already subscribed to databases—a plus

A.2. Interface

- One File and inContext meet all interface descriptions specified in RFP
- Strong capabilities for viewing results lists and individual records in multiple ways
- Gale Power Search platform allows users to search across multiple resources and eliminates duplicate results
- Users can print and email single records with no restrictions
- Works well with multiple citation management tools
- Strong integration options with common course management systems and course reserve systems
- Strong integration capabilities with local library systems and discovery vendors
- Supports Open URL
- Provides KBART-compliant metadata
- Provides MARC-21 compliant records for named databases and Ebooks content that include RDA elements
- Multiple ways that users may create alerts and share content
- Provides a mobile app

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- Provides search interfaces for K-5 students, middle school, high school, undergrads, university researchers, and adult consumers
- Robust language tools. Provides translation tools for 50 languages in most resources. Some of the languages are available in text to speech format too.
- “Many” resources offer text to speech capabilities
- Predictive search assistance.
- No restrictions on multiple copies/use
- Committed to meeting WCAG. VPATs are provided.
- Lexile level searching capability is a plus
- PDF does not capture original article but rather text only
- Permalinks work well

A.3. Authentication

- Works with EZProxy and other proxy services
- Provides Remote Patron Authentication Services
- Convenient single sign on option allows for one sign in to use all Gale products in the package
- Since 2018, has provided DML’s customized geoauthentication service
- Provides authentication for authorized users outside of Maine
- Proven capability of providing DML’s authentication needs, a significant plus

A.4. Statistics and Reporting

- COUNTER 5 and SUSHI compliant
- Usage reports available in multiple formats and provides a usage dashboard for state level consortia
- Along with standard reporting which is robust, vendor will work with clients to provide customized reports based on needs
- Can provide stats for state as a whole, individual libraries, library types, and individual resources for any time period

A.5. Training and Marketing

- Works with clients to create a customized training plan. Training options include multiple formats.
- 5 days onsite training and 12 virtual training sessions per year included in pricing. Additional training available for a fee. Many asynchronous options available, included in pricing.
- Use feedback from clients to improve training

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EVALUATOR DEPARTMENT: Maine State Library

- Works with clients to create a customized marketing plan, which includes promoting the value of libraries to the community. Will provide a custom support portal page.
- Provide a range of customizable marketing materials

A.6. Discovery, Metadata, Linking, and Branding

- Widgets, title lists, icons, and MARC records are provided
- Geo Links provided for individual libraries
- Many customization options are available for both DML and individual libraries, including branding, local links, subsets of resources, and more
- MARC records can be customized

A.7. Support and Service

- Strong customer service ethos
- In the last year, 99.77% availability. Longest outage was 1 ¾ hours
- Technical staff on duty 24/7/365
- Plenty of lead time for both planned maintenance and changes to the products.
- Actively and continuously collects and assesses user and library satisfaction in a variety of ways
- Search and accessibility upgrades planned in 2025
- Provides a highly detailed, thorough implementation plan and timeline

B.1. Additional Services

- Geoauthentication services work very well for DML, a big plus
- Gale Pages are a highly useful feature for school and public libraries. It is well supported. This is a big plus.
- Support portal
- Usage dashboard
- Usage reviews
- Cross searching platforms
- Online learning portal

III. **Appendix H** – Technical Assessment Form

- Minimal answer about data compliance
- Use AWS, which is very secure
- Meets info security standards
- Cloud service and NIST requirements—minimal information, though not required

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc. - Package 3

DATE: May 8, 2024

EVALUATOR NAME: [Heidi Cook](#)

EVALUATOR DEPARTMENT: RSU5/Freeport High School

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

File 1 – Preliminary Information

- I. **Appendix A – Cover Page**
Submitted as required: Y/N
Yes
- II. **Appendix B – Debarment, Performance, and Non-Collusion Certification Form**
Submitted as required: Y/N
Yes

File 2 – Organization Qualifications & Experience

- I. **Appendix C – Qualifications & Experience Form**
Currently MSL's primary statewide provider (P)
Proven track record w MSL
Works with over 40 states/provinces
- II. Subcontractors
I don't see this (Q)
- III. Organizational Chart
Yes-limited
- IV. Litigation
I don't see this (Q)
- V. Licensure/Certification (none required)
Yes
- VI. Certificate of Insurance
Yes

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: [Heidi Cook](#)

EVALUATOR DEPARTMENT: RSU5/Freeport High School

File 3 – Proposed Services and Technical Assessment

I. **Appendix F** – Proposed Content Template

A.1. Scope of Services to be Provided: Content

a. General Interest Resources

Yes

b. Newspapers

Yes

c. Readers Advisory

Yes

d. Prek-12 Resources

Yes: extensive

e. Academic Resources

yes (some repetition in list: Gale in Context: college listed 3x in column)

f. Small Business Resources

yes

g. Reference eBooks/ Resources

yes

h. Career, College, & Workforce Building Skills

yes

- B. Scope of Services – Additional Content Resources
Extensive descriptions of each resource (P)
- LC subject headings used (P)
- Strong K-12 integration & alignment to Maine Learning results where applicable (P)
- Metrics included (attachment 1 for titles & coverage, etc)
- Are percentages of full-text titles in collections truly full-text by our definition? (Q)
- “The complete text (including graphics, e.g. images, pictures, charts) of each referenced article is available for online viewing, printing, or downloading. If two (2) or more images/charts per issue appear in the print version, but are omitted from the online version due to legal reasons, the publication will not be considered full-text.”
- Gale Interactive: Science virtual lab: new to MSL (Q)
 - Aligned with Next Gen. Science Standards & common Core (P)
 - Interlinks with Gale in Context: Science (P)
- Miss Humblebee’s Academy: new to MSL (I)
- Gale business: Insights: new to MSL (I)
- Gale business: Plan Builder: new to MSL (I)

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EVALUATOR DEPARTMENT: RSU5/Freeport High School

Integrated with Entrepreneurship & Legal forms (I)

- eBooks: “Gale eBooks content is fixed, dependent on the titles chosen for inclusion. State Library can refresh or swap-out titles annually at the time of renewal with a list of approved titles provided by Gale.” Would this be every 2 years for MSL? (Q)

II. Appendix G – Response to Proposed Services Form

Part II, Scope of Services to be Provided

A.1. Content

- MSL may add or remove items from the bundle and pricing will be changed accordingly (P)
- “Gale will identify and automatically cancel the individual subscriptions for the products included in the new contract, calculate the credit due and contact the institutions involved to ascertain the disposition of the credits. Customers may use credits at face value to pay an outstanding Gale invoice and license or purchase new Gale products” (P)
- page 2: Gale database local control option tool: “allows customer institution to immediately remove an article and/or remove an entire publication from view in all Gale databases at that institution.” (I)

Is this only at state level? i.e. not at individual sites (Q)

A.2. Interface

1. a Default can be set to Advanced for many resources (P)
Is this at site or state level? (Q)
- b “Search assist” and “did you mean?” for search support/assist (P)
- c. Multiple search modes. (P)
includes “I Wonder...” for elementary and Visualization of search results with Topic Finder tool
- e. Many Gale databases support Lexile level searching (P)
- f. Robust search features, including Boolean, truncation, wildcards (P)
- g. Pre (and post) search limiters (P)

2 a.Didn’t address default sort basis (N)

- a.Variety of sort options depending on database
- b. Post search options are available: vary by database
- c. Able to share search histories (P)
- d. Only 2 databases support batch marking and downloading of records: others support display, print, email, and sharing of single records. (N)

3. PowerSearch eliminates duplicates (P)

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EVALUATOR DEPARTMENT: RSU5/Freeport High School

- User can select which databases to include in search (P)
4. PDF available as download option. is this in all databases? In some cases, PDF of original publication (with images, charts, and diagrams) and other times PDF of text only (i.e., converted from HTML)
- No indication in results of when original scanned PDF is available. (N)
- Trial indicated that some files are machine-generated PDFs: At top of downloaded OneFile record “Disclaimer: This is a machine generated PDF of selected content from our products. This functionality is provided solely for your convenience and is in no way intended to replace original scanned PDF.”
- Ability to save directly to Google Drive/Classroom and Microsoft OneDrive is addressed below under course management integration, but is also a valuable output option (P)
- Only HTML text versions savable to Google & OneDrive apparently, even when original content PDF exists for download (N)
5. Four common citation formats supported as well as robust citation management compatibility, including RIS file format.(P)
6. True integration with Google Drive [and classroom] and Microsoft OneDrive (P)
7. “Get Link” permalink feature discussed as tool for electronic reserves
8. Answered completely (P)
9. Answered completely (P)
10. Answered completely. Links to resources work without authentication. Prompted for authentication when user tries to further interact with resource. (P)
11. Built on mobile responsive framework. (P)
- Access My Library mobile app available
12. Varied search interfaces for different user groups (P)
13. Many languages available through translation tools in many of the Gale product families: product interface and Document levels via print, and also via text-to-speech audio for many languages (for text-based/HTML content only).
- Some databases support interface translation only
- LegalForms contains many Spanish language forms (P)
- Miss Humblebee’s and Peterson’s test & career prep support user interface in Spanish

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EVALUATOR DEPARTMENT: RSU5/Freeport High School

14. ReadSpeaker function on many Gale resources. Works in many languages. (P)

15. ADA compliant and always evolving. Supports variety of display options. (P)

16. Wide variety of help options (P)

A.3. Authentication

1. Robust! (P)

supports single sign on (SSO) (P)

[Would SSO be available for students? non-RFP specific question]

2. Geo Authentication and IP Authentication (P)

3. Willing and able & has track record (P)

4. Geo authentication used at Title, article, and topic/results set levels

5. "Geo Links" available to all ME libraries

6. Robust & have more options available

7. Infrastructure currently in place and ready to move forward with enhancements(P)

8. This is currently in place

A.4. Statistics and Reporting

1. Robust report options available: COUNTER reports/SUSHI usage reports
compliant

customization available

2. all reporting levels can be met (statewide, library type, and library site)

3. Time intervals: monthly reports generated regularly

Usage reports available on demand (monthly reports available first week of
following month)

A.5. Training and Marketing

1a all formats of training supported

1b live on-site, virtual training (live & prerecorded) and training support materials.

Most document-based materials can be customized

Custom support site

New materials added continuously

Many samples provided in links

1c Five (5) days on-site training per contract year & up to 12 virtual session per
contract year.

1d. additional on-site days: \$3750/per day (Would this be 2-3 hours?) (Q)

additional virtual training: \$400/per session (30-60 minute)

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EVALUATOR DEPARTMENT: RSU5/Freeport High School

1e. short videos and tip sheets for end users are readily available online (P)

1f. yes: in training sessions and at “Gale support roundtables”

2a most materials support this

2 b. multi-channel marketing

custom support portal: widgets, communication templates, social media-ready marketing as well as traditional print materials

Robust Marketing team & tools

PR toolkit

A.6. Discovery, Metadata, Linking, and Branding

1 Widgets, Icons/descriptions/links, MARC records/Title Lists

Geo Links

AML Access My Library mobile app

2 “Gale resources can be customized by MSL, its member libraries and/or by Gale as may be preferred. Gale’s Admin permits member libraries (if they choose) to modify their account settings to meet their needs, including [wide variety of options]. (P)

3. Statewide branding available. Custom institution branding also available. (P)

4. OK

5. MARC records available to customize and download

Ex Libris

A.7. Support and Service

1. highest level

2. 99.77% availability

9. Detailed Gale Implementation Plan included as separate file

B.1. Additional Services

Gale Pages (P)

DML support portal (P)

Usage dashboard (P)

Usage reviews (P)

III. Appendix H – Technical Assessment Form

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc. - Package 3

DATE: May 9, 2024

EVALUATOR NAME: Jenna Davis

EVALUATOR DEPARTMENT: Maine State Library

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

File 1 – Preliminary Information

- I. **Appendix A – Cover Page**
Submitted as required: *Yes*

- II. **Appendix B – Debarment, Performance, and Non-Collusion Certification Form**
Submitted as required: *Yes*

File 2 – Organization Qualifications & Experience

- I. **Appendix C – Qualifications & Experience Form**
Comprehensive provider serving over 40 states and provinces.

- II. Subcontractors
Not listed.

- III. Organizational Chart
Yes; in Appendix C narrative.

- IV. Litigation
Not listed.

- V. Licensure/Certification (none required)
Yes.

- VI. Certificate of Insurance
Yes.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources **BIDDER**

NAME: Cengage Learning, Inc. - Package 3

DATE: May 9, 2024

EVALUATOR NAME: Jenna Davis

EVALUATOR DEPARTMENT: Maine State Library

File 3 – Proposed Services and Technical Assessment

I. **Appendix F** – Proposed Content Template

A.1. Scope of Services to be Provided: Content

a. General Interest Resources

Good diversity of sources. Especially like seeing OneFile and LegalForms. OneFile: News.

c. Readers Advisory

Includes Gale Books and Authors.

d. Prek-12 Resources

Wide array of offerings for many age groups. Includes Educator's Reference Complete. Citation integration. Includes both Gale in Context: Science and Gale Presents: Miss Humblebee's Academy.

e. Academic Resources

Includes Academic OneFile: Select and Health Sciences Research Collection. Collections are robust, generally with no embargoes. This collection includes Gale Business: Insights as well as Gale: In Context and Gale Interactive Science.

f. Small Business Resources

Includes Gale Business: Entrepreneurship, Gale Business: Insights, and Gale Business: Plan Builder.

g. Reference eBooks/ Resources

Includes Gale eBooks General Reference as well as ebook offerings.

h. Career, College, & Workforce Building Skills

Includes both ChiltonLibrary and Peterson's Test & Career Prep.

B. Scope of Services – Additional Content Resources

None noted.

II. **Appendix G** – Response to Proposed Services Form

Part II, Scope of Services to be Provided

A.1. Content

Flexible with packages offerings. Per vendor: "Databases can be added or removed from the proposed bundle packages upon request." Will prorate.

A.2. Interface

Default basic search, can be sent to advanced at site level. Provides search support/suggest functionality, including search assist. Gale Power Search available when searching multiple databases. No copy restrictions. Citation support. LMS integration support. Integrates with discovery (EDS, etc). Search alerts & advanced search functions. Robust translation tools. Detailed examples (with graphics)

**STATE OF MAINE
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EVALUATOR DEPARTMENT: Maine State Library

provided.

A.3. Authentication

Works with EZ Proxy as well as several other authentication services. Offers single sign-on. Can IP authenticate and provides geo location. Has worked to provide services for Digital Maine Library and is familiar with our needs.

A.4. Statistics and Reporting

Provide standardized, comprehensive reports. May be requested via email or accessed using an admin dashboard. On-demand and/or delivered via email once per month. Detailed graphics showing interface. List of available data elements.

A.5. Training and Marketing

Detailed document provided separately discussing implementation timeline. Appendix G outlines robust training plan, including outreach activities.

A.6. Discovery, Metadata, Linking, and Branding

Customizable widgets, links, etc. Support open URL. Flexible with customization and branding.

A.7. Support and Service

Dedicated consortia staff. 99.77% system availability over the last 12 months. Maintenance planned during times of lower user impact. Detailed plan and response.

B.1. Additional Services

Overall comprehensive response. Did add GalePages, support portal, usage services.

III. Appendix H – Technical Assessment Form

Review by Bill Wheeler.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc. – Package 3

DATE: May 7, 2024

EVALUATOR NAME: Tim Morton

EVALUATOR DEPARTMENT: Bowdoin College

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department’s RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments: *Differences from Package 2 in italics*

File 1 – Preliminary Information

- I. **Appendix A – Cover Page**
Submitted as required: Y

- II. **Appendix B – Debarment, Performance, and Non-Collusion Certification Form**
Submitted as required: Y

File 2 – Organization Qualifications & Experience

- I. **Appendix C – Qualifications & Experience Form**
 - P – agreements with 40+ states/provinces
 - P – significant contacts with other publishers, libraries, content producers
 - P – experience/staffing to provide support

- II. Subcontractors
Not addressed

- III. Organizational Chart
Included in main overview

- IV. Litigation
Not addressed

- V. Licensure/Certification (none required)
Not required

- VI. Certificate of Insurance
Included

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc. – Package 3

DATE: May 7, 2024

EVALUATOR NAME: Tim Morton

EVALUATOR DEPARTMENT: Bowdoin College

File 3 – Proposed Services and Technical Assessment

I. **Appendix F** – Proposed Content Template

A.1. Scope of Services to be Provided: Content

Common

P – consistent indexing across products

P – frequent product updates

P – integration with LMS and other systems

P – integrated citation tools

a. General Interest Resources

ChiltonLibrary

P – usable by multiple constituent groups (p.3)

I – commonality with industry resources (p.4)

Gale General OneFile and Subject Collections

Q – what is the relationship between General and Subjects?

Q – is this a single offer or pick and choose subjects?

I – 22,801 titles, but only 13,393 are full-text

P – low % of embargoed titles (p.12)

Gale Health and Wellness

P – mix of journal and reference content (p.15-16)

I – 1,752 titles

N – large % of OA titles (p.17)

P – low % of embargoed titles (p.18)

Q – how is out-of-date content removal handled?

Gale LegalForms - State of Maine

Q – who created the forms?

Q – liability for errors in forms?

Q – how many are available elsewhere?

Gale Literature Resource Center

I – 4,150 titles, but only 529 are full-text

P – broad global, genre, and temporal coverage (p.24)

P – low % of embargoed titles (p.26)

Gale Literature: Scribner Writer Series

P – covers the traditional English-language author canon (p.29)

I – titles details not in indicated attachment

Gale Literature: Twayne's Author Series

Q – overlap of authors in Scribner?

P – features world authors (p.32)

Gale OneFile: Informe Academico

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

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DATE: May 7, 2024

EVALUATOR NAME: Tim Morton

EVALUATOR DEPARTMENT: Bowdoin College

P – Spanish and Portuguese content (p.36)

I – 1,307 titles

N – large % of OA titles (p.38)

Q – average backfile size of 113 years? (p.38)

Q – is the described indexing also multilingual?

b. Newspapers

Gale OneFile: News

I – 3,866 newspaper titles

P – low % of embargoed titles (p.43)

I – 2 ME newspapers

c. Readers Advisory

Gale Books and Authors

P – intentional diversity and inclusion efforts for content

P – serves multiple constituent groups

d. Prek-12 Resources

Gale in Context: Elementary

I – serves grades K-5

P – multiple content types/subjects (p.50)

Q – Default indexing blurb, custom indexing for kids?

Gale in Context: Environmental Studies

I – 1,034 titles

P – low % of embargoed titles (p.57)

Gale in Context: High School

I – 2,368 titles

P – low % of embargoed titles

P – topic-based discovery (p.61)

Gale in Context: Middle School

P – topic-based discovery (p.66-67)

I – 1,441 titles

P – low % of embargoed titles (p.69)

Gale in Context: Opposing Viewpoints

P – multiple, opposing perspectives (p.72)

P – coverage of popular sociopolitical issues (p.72)

N – Only 60% full-text titles (p.74)

P – Almost no embargoed titles (p.75)

Gale in Context: Science

P – multiple types of content (p.78-79)

I – 1,866 titles

P – low % of embargoed titles

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

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DATE: May 7, 2024

EVALUATOR NAME: Tim Morton

EVALUATOR DEPARTMENT: Bowdoin College

Gale OneFile: Educator's Reference Complete

I – focus on educators rather than students (p.90)

P – full-text of ERIC content (p.91)

I – 1,324 titles

N – only 66% full-text titles

P – low % of embargoed titles

Gale OneFile: High School Edition

I – general database with a variety of subjects/content types

I – 1,997 titles

P – low % of embargoed titles

Gale Presents: Miss Humblebee's Academy

I – for ages 3-6

P – mix of online content and offline activities

P – aligns with Maine and other content standards

Gale Presents: National Geographic Kids

I – complete run of Nat Geo Kids from 2009-Present

P – supplementary book and multimedia content

e. Academic Resources

Gale OneFile: Health Sciences Research Collection

I – grouping of 4 health science topical collections

I – 6,573 titles

N – 65% full-text titles

P – low % of embargoed titles

Q – policies on removing outdated medical information?

Gale in Context: College

I/P – interdisciplinary, multi-format collection (p.113)

I – 2,368 titles

P – low % of embargoed titles (p.116)

Gale Academic OneFile: Select

I – their largest, general-interest resource (30 subject collections)

I – 28,121 titles

P – low % of embargoed titles (p.125)

Gale Business: Insights

I – variety of business-related content

I – 12,846 titles

I – low % of embargoed titles (p.132)

Gale in Context: Environmental Studies

I – 1,034 titles

P – low % of embargoed titles

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc. – Package 3

DATE: May 7, 2024

EVALUATOR NAME: Tim Morton

EVALUATOR DEPARTMENT: Bowdoin College

Gale in Context: Opposing Viewpoints

P – multiple, opposing perspectives

P – coverage of popular sociopolitical issues

N – Only 60% full-text titles

P – Almost no embargoed titles

Gale in Context: Science

P – multiple types of content

I – 1,866 titles

P – low % of embargoed titles

Gale Interactive: Science

P – interactive, multimedia content

Q – integration with other Cengage content?

Gale Literature Resource Center

I – 4,150 titles, but only 529 are full-text

P – broad global, genre, and temporal coverage

P – low % of embargoed titles

Gale Literature: Scribner Writer Series

P – covers the traditional English-language author canon

I – titles details not in indicated attachment

Gale Literature: Twayne's Author Series

Q – overlap of authors in Scribner?

P – features world authors

Gale OneFile: Educator's Reference Complete

I – focus on educators rather than students

P – full-text of ERIC content

I – 1,324 titles

N – only 66% full-text titles

P – low % of embargoed titles

f. Small Business Resources

Gale Business: Entrepreneurship

P/Q – sample business plans (unique content?)

I – 654 titles

P – low % of embargoed titles (p.189)

Gale Business: Insights

I – variety of business-related content

I – 12,846 titles

I – low % of embargoed titles

Gale Business: Plan Builder

I/P – software rather than content

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: Bowdoin College

P – integration with other Gale business and legal resources

g. Reference eBooks/ Resources

Gale eBooks General Reference

I – selection of 50 titles to be selected by MSL

N – no credit/alternate titles for libraries that own them

N/Q – header mentions annual hosting fee, but no information?

Gale Literature: Scribner Writers Series (eBooks)

Q – different than main Scribner entry?

Gale Literature: Twayne’s Author Series (eBooks)

Q – different than main Twayne’s entry?

h. Career, College, & Workforce Building Skills

ChiltonLibrary

P – usable by multiple constituent groups

I – commonality with industry resources

Gale OneFile: Educator’s Reference Complete

I – focus on educators rather than students

P – full-text of ERIC content

I – 1,324 titles

N – only 66% full-text titles

P – low % of embargoed titles

Gale Presents: Peterson’s Test and Career Prep

I – wide variety of practice tests and school searches

P – usable by multiple constituent groups

B. Scope of Services – Additional Content Resources

No entries

II. **Appendix G** – Response to Proposed Services Form

Part II, Scope of Services to be Provided

A.1. Content

P – can add/remove database from proposed list

P – prorated credits for libraries that subscribe individually

P – trial already running

A.2. Interface

P – meets all functionality in A.2.1

P – search by content level/lexile

P cross-database search capability (A.2.3)

P – printing/exporting of content and citations (A.2.4 and A.2.5)

P – integration with LMS and other systems (A.2.6 and A.2.7 and A.2.8)

P – customized search interfaces for K-12 students (A.2.12)

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: Bowdoin College

Q – how are translations performed? (A.2.13)

A.3. Authentication

P – multiple authentication options, including geoauthentication

P – currently providing this service in Maine

A.4. Statistics and Reporting

P – stats are COUNTER and SUSHI compliant

P – data available at statewide and institutional levels

A.5. Training and Marketing

P – plan for training within 30 days of award in variety of formats

N – max of 5 on-site and 12 virtual trainings per year

P – custom marketing support portal

A.6. Discovery, Metadata, Linking, and Branding

P – individual libraries can customize interfaces, etc

P – allows for library branding

I – one-time setup for linking out

P/Q – MARC records provided, records via Alma and other systems? (A.6.6)

A.7. Support and Service

N – incomplete answer to support section A.7.1

P – longest outage in last year was <2 hours (A.7.2)

P – outline of coming enhancements (A.7.6)

N – incomplete answer to MSL feedback section A.7.8

P – streamlined implementation as their currently providing this content (A.7.9)

B.1. Additional Services

P – customizable Gale portals available for each library

P – custom support portal for MSL

III. **Appendix H** – Technical Assessment Form

They appear to meet state IT requirements

Full VPATs provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc. Package 3

DATE: 5/9/2024

EVALUATOR NAME: Tim Pellett

EVALUATOR DEPARTMENT: Maine InfoNet

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

File 1 – Preliminary Information

- I. **Appendix A – Cover Page**
Submitted as required:

- II. **Appendix B – Debarment, Performance, and Non-Collusion Certification Form**
Submitted as required:

File 2 – Organization Qualifications & Experience

- I. **Appendix C – Qualifications & Experience Form**
 - Has been in business for over 68 years.
 - Extensive experience working with large consortia.
 - Extensive experience working with all library types.
 - Proven track record as a current customer of this bidder.

- II. Subcontractors
 - Did not submit ??

- III. Organizational Chart
 - Submitted meets RFP requirements

- IV. Litigation
 - Did not submit ??

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc. Package 3

DATE: 5/9/2024

EVALUATOR NAME: Tim Pellett

EVALUATOR DEPARTMENT: Maine InfoNet

- V. Licensure/Certification (none required)
 - Submitted meets RFP requirements

- VI. Certificate of Insurance
 - Submitted meets RFP requirements.

File 3 – Proposed Services and Technical Assessment

I. **Appendix F** – Proposed Content Template

A.1. Scope of Services to be Provided: Content

Package 3

Package 3 adds Gale in Context: Science, Gale Interactive Science, Miss Humblebee’s Academy, and Gale Business: Plan Builder in addition to content from Package 1 and 2.

a. General Interest Resources
- Meets RFP requirements

b. Newspapers
- Meets RFP requirements

c. Readers Advisory
- Meets RFP requirements

d. Prek-12 Resources
- Meets RFP requirements

e. Academic Resources
- Meets RFP requirements

f. Small Business Resources
- Meets RFP requirements

g. Reference eBooks/ Resources
- Meets RFP requirements

h. Career, College, & Workforce Building Skills
- Meets RFP requirements

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc. Package 3

DATE: 5/9/2024

EVALUATOR NAME: Tim Pellett

EVALUATOR DEPARTMENT: Maine InfoNet

B. Scope of Services – Additional Content Resources

II. **Appendix G** – Response to Proposed Services Form

Part II, Scope of Services to be Provided

A.1. Content

- They will automatically identify preexisting subscriptions by library and provide credit.
- Tools in place to content issues
- Provided trial information including access to training center to view webinars, tutorials, LibGuides, professional development etc.

A.2. Interface

- Robust search interface (keyword/title, advanced, publication)
- Browse by discipline, topic finder
- Lexile level filter
- Robust advanced search commands and qualifiers
- Can save and share search history
- Mark, display, print, email, share records from result set
- Power Search interface to cross search most databases
- Articles in HTML and PDF format
- MP3 downloads allowed
- Robust options for citation options and exports
- Integrates with Google Classroom, Microsoft 365, BrightSpace etc
- No restrictions on multiple copies of digital and print content.
- Integration with Discovery systems – EDS, Primo, Summon etc
- Supports OpenURL
- Shared links do not require authentication
- Mobile app that uses geo authentication
- Multiple interface option for different grade levels
- Content translates to over 50 languages

A.3. Authentication

- Supports many auth systems including EZProxy (IP), SAML, LDAP, NCIP, OpenAthens plus more.
- Provides robust geo-authentication that integrates into existing authentication
- Geo auth works with most providers, not just Gale's.

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc. Package 3

DATE: 5/9/2024

EVALUATOR NAME: Tim Pellett

EVALUATOR DEPARTMENT: Maine InfoNet

- Currently use Gale's geo-auth since 2018 and have made nice modifications since then, including geo auth on a journal and article level.
- Customized admin interface to manage resources, Ips etc.
- Customized interface provides detailed geo auth usage
- Geo auth also available to all libraries.

A.4. Statistics and Reporting

- Robust usage reports available in multiple formats
- Offers COUNTER 5 reports and non-COUNTER reports
- Also provides a separate robust usage dashboard for consortia
- Provides SUSHI service

A.5. Training and Marketing

- Currently provides a robust support website dedicated to Maine with training and marketing materials and much more.
- Robust training options in a variety of formats, live and recorded webinars, tutorials
- Support for both administrative and general staff.
- Ongoing training
- Provides social media, newsletter, email content
- Provides lesson plans, projects and scavenger hunts for K-12 students
- Database specific resource guides, tip sheets, tutorials and recorded webinars
- Five days of on-site training available
- Marketing materials can be customized with library logo and URL for posters, bookmarks etc.
- Dedicated training and marketing websites for Maine.

A.6. Discovery, Metadata, Linking, and Branding

- Custom branding for each library account

A.7. Support and Service

- Dedicated CSRs for individual libraries based on library type
- Robust admin console with many customizations to manage auth settings, branding/linking, open URL, marc record download, more.
- Dedicated consortia level support, bypassing level 1 techs (if mentioned in RFP)
- Content indexed in Google Scholar and other search engines.
- 99.77% uptime
- Current status website for outages
- Robust network/platform for infrastructure and connectivity

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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BIDDER NAME: Cengage Learning, Inc. Package 3

DATE: 5/9/2024

EVALUATOR NAME: Tim Pellett

EVALUATOR DEPARTMENT: Maine InfoNet

B.1. Additional Services

- III. **Appendix H** – Technical Assessment Form
- See notes from Bill Wheeler, State OIT liaison for this RFP.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc.

DATE: May 10, 2024

EVALUATOR NAME: William Wheeler

EVALUATOR DEPARTMENT: Maine Office of Information Technology

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

While I participated in the meetings, I left the application evaluation to those that are familiar with the library and knew what they needed in the application. I felt I could add very little to this part of the process. I did evaluate Appendix H and my notes for that are below.

File 1 – Preliminary Information

- I. **Appendix A – Cover Page**
Submitted as required: Y/N
Yes

- II. **Appendix B – Debarment, Performance, and Non-Collusion Certification Form**
Submitted as required: Y/N
Yes

File 2 – Organization Qualifications & Experience

- I. **Appendix C – Qualifications & Experience Form**
Provided

- II. Subcontractors

- III. Organizational Chart
Provided

- IV. Litigation

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc.

DATE: May 10, 2024

EVALUATOR NAME: William Wheeler

EVALUATOR DEPARTMENT: Maine Office of Information Technology

V. Licensure/Certification (none required)

VI. Certificate of Insurance
 Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

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DATE: May 10, 2024

EVALUATOR NAME: William Wheeler

EVALUATOR DEPARTMENT: Maine Office of Information Technology

File 3 – Proposed Services and Technical Assessment

I. **Appendix F** – Proposed Content Template

I am not familiar with the State Library, their needs, or whether what was proposed was sufficient. I left the assessment of these areas to those members that could make a far better determination than myself.

A.1. Scope of Services to be Provided: Content

- a. General Interest Resources
- b. Newspapers
- c. Readers Advisory
- d. Prek-12 Resources
- e. Academic Resources
- f. Small Business Resources
- g. Reference eBooks/ Resources
- h. Career, College, & Workforce Building Skills

B. Scope of Services – Additional Content Resources

II. **Appendix G** – Response to Proposed Services Form

I am not familiar with the State Library, their needs, or whether what was proposed was sufficient. I left the assessment of these areas to those members that could make a far better determination than myself.

Part II, Scope of Services to be Provided

- A.1. Content
- A.2. Interface
- A.3. Authentication
- A.4. Statistics and Reporting
- A.5. Training and Marketing
- A.6. Discovery, Metadata, Linking, and Branding
- A.7. Support and Service
- B.1. Additional Services

III. **Appendix H** – Technical Assessment Form

While Cengage did answer the Data Compliance, Non-Functional Requirements, and Security Standards tabs of the Appendix H document, they failed to provide any detailed description to the Cloud Services or NIST requirements tabs and only indicated that “Yes”, they comply.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Cengage Learning, Inc.

DATE: May 10, 2024

EVALUATOR NAME: William Wheeler

EVALUATOR DEPARTMENT: Maine Office of Information Technology

They provided no real description on the Data Compliance tab and only stated that they would supply that information as needed.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: EBSCO Package #1

DATE: May 10, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

Instructions: *The purpose of this form is to record proposal review notes written by individual evaluators for this Request for Proposals (RFP) process. It is required that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

File 1 – Preliminary Information

- **Appendix A – Cover Page**
Submitted as required: Y

- **Appendix B – Debarment, Performance, and Non-Collusion Certification Form**
Submitted as required: Y

File 2 – Organization Qualifications & Experience

- I. **Appendix C – Qualifications & Experience Form**
 - Impressive 80 years in existence and providing online resources since 1995
 - Mentions serving public, academic, K12 and special libraries
 - Major company with over 3,000 employees
 - Include 3 similar clients—KY, CT, RI
 - Long term provider in Maine, both DML and individual libraries

- II. Subcontractors
No subcontractors will be used for this contract but do use subprocessors.

- III. Organizational Chart
Robust, logical, detailed

- IV. Litigation
Statement of no litigation

- V. Licensure/Certification (none required)
ISO 27001 security framework compliance document provided

- VI. Certificate of Insurance

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: EBSCO Package #1

DATE: May 10, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

Submitted as required, appears adequate

File 3 – Proposed Services and Technical Assessment

I. **Appendix F** – Proposed Content Template

A.1. Scope of Services to be Provided: Content

- Direct linking between products is a plus
- Enhanced LTI integration with school LMS and authentication systems
- Includes open source content, but only charges for paid content
- Libraries can exclude A&I titles to make fully full text content
- majority of most important periodicals have no embargo period
- offers cumulative coverage of indexing, abstracts and full text, including extensive backfiles
- offers integration with LTI v.1.3 compliant systems, including common LMS, as well as share-to Google Classroom options, and single sign-in with Google or Clever SSO
- handy citation tool, and exports to other citation tools
- K12 ties are helpfully mentioned in resources not in the preK-12 category
- Proposal is well organized, easy to navigate

a. General Interest Resources

Meets requirements of RFP

Well rounded selection of topics

- Alt HealthWatch
 - complementary, holistic and integrated approaches to health care and wellness
 - journals and magazines
- Auto Repair Source
 - Content is processed by automotive experts at MOTOR and comes from the Original Equipment Manufacturers. Is a division of Hearst Business Media
 - Designed for touch-enabled devices
 - Updated quarterly
 - No videos, a drawback
- Consumer Health Compete

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

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BIDDER NAME: EBSCO Package #1

DATE: May 10, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

- Comprehensive consumer health resource
- Journals, magazines, trade publications, audio, video, reports, diagrams, comes with a companion eBook collection
- Updated weekly

- Hobbies & Crafts Source
 - full-text hobby and craft magazines, journals, hobby profiles, recipes and videos. comes with a companion eBook collection

- Home Improvement Source
 - Academic journals, magazines, trade publications, images. comes with a companion eBook collection
 - Updated weekly
 - Does not include videos

- Legal Information Source
 - full text legal reference works, journals, trade publications, magazines and legal forms for consumers and small businesses
 - updated weekly

- MasterFILE Complete
 - full-text magazines, journals, images, reference books, 75,000 videos from AP, primary sources for the general public. comes with a companion eBook collection
 - updated daily

- Small Engine Repair Source
 - User friendly repair and maintenance guides for all types of small engines
 - Full text reference books with photos and illustrations
 - Updated monthly
 - No multimedia content

- b. Newspapers
Meets RFP requirements
 - Newspaper Source Plus
 - full-text collection of the world's major news content—500+ titles of newspapers and newswires, tv and radio transcripts and ongoing daily updates from popular news sources

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: EBSCO Package #1

DATE: May 10, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

- update up to 4 times daily
- 16 years average length of back files
- No video content but tv and audio news transcripts are included
- Includes Maine titles: KJ, Bangor Daily News, Morning Sentinel (Waterville), Portland Press Herald, Sun Journal (Lewiston)
- Updates daily but does not specify which publications this includes

c. Readers Advisory

Exceeds RFP requirements

- NoveList Plus and K-8 Plus
 - Leading industry readers advisory tool
 - Covers all genres of fiction and nonfiction, includes samples of audiobooks for previewing
 - Many user friendly ways to browse, including a “Make Your Own Appeal Mix” tool
 - Includes 4 age brackets (Adult, Teen, Ages 9-12 and Ages 0-8)
 - Includes “on the shelf” feature to see if titles are available at your local library
 - Updated weekly, adds 25K new titles each year
 - Created by librarians, for librarians. 25 librarians on staff—a major plus
 - Going on for 30 years
 - Can search by Lexile and AR levels
 - Points out that this aids parents, teachers, librarians, and students directly
 - Product has its own taxonomy, indexing and controlled vocabularies developed in house for user friendliness
 - Robust educational support materials

d. Prek-12 Resources

- Exceeds RFP requirements
- Comprehensive
- Align with Common Core standards. Mentions that Maine standards align with Common Core but nothing more specific.
- EBSCO Connect support site provides resources for teachers, educators, administrators, librarians—lesson plans, templates, rubrics, scavenger hunts, training, promo materials, list of funding sources, info literacy etc. Also provides support for students—research, writing, info literacy, etc.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: EBSCO Package #1

DATE: May 10, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

- LTI integration with automatic role provisioning. Fully integrated with Google Classroom, Canvas, Blackboard, Moodle, Desire2Learn and Schoology LMS platforms
- Does it allow simultaneous usage of eBooks?

- Biography Reference Source
 - Thousands of unique biographies. Comes with a companion eBook collection
 - Primary and secondary schools

- EBSCO eBooks Cricket Media Collection
 - eBook collection for preK-8
 - digital access to short-form fiction and nonfiction titles by Cricket Media
 - full text, from 1995
 - updated quarterly
 - specifies alignment with MLR, a plus

- ERIC
 - A licensed index. Indexed and links to full-text education literature and resources, sponsored by the US Department of Education

- History Reference Source
 - Covers all time periods and aspects of global history
 - Primary and secondary schools
 - Journals, magazines, biographies, primary source docs. Comes with a companion eBook collection
 - Updated weekly

- Literary Reference Plus
 - collection of reference works across all genres and time periods. It contains thousands of poems, short stories, classic novels, plot summaries, critical analysis essays, literary journals, reference books and author biographies, plus lesson plans and literary study guides. Comes with a companion eBook collection
 - Primary and secondary schools
 - Updated daily

- MAS Complete
 - Designed for high school libraries.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

- full text of hundreds of popular magazines and e-books covering a range of topics. Also full-text primary source documents and videos from AP. Comes with a companion eBook collection
- focus on current events/news

- Middle Search Plus
 - Designed for middle school libraries
 - popular middle school magazines and thousands of primary source documents and videos. Comes with a companion eBook collection
 - focus on current events/news, popular kids' topics

- Poetry & Short Story Reference Source
 - full-text of poems, short stories, biographies, essays, lesson plans and learning guides. It also includes high-quality videos and audio recordings from the Academy of American Poets. Comes with a companion eBook collection
 - primary and secondary school libraries

- Points of View Reference Source
 - Provides resources presenting different views of current topics from magazines and point of view essays
 - Primary and secondary school libraries
 - each topic includes a Guide to Critical Analysis

- Primary Search
 - Elementary school libraries
 - full text for popular children's magazines and encyclopedic entries written specifically for kids. Comes with a companion eBook collection
 - covers a range of popular kids' topics and school subjects

- Professional Development Collection
 - full-text resources for educators, professional librarians and education researchers
 - journals, magazines, trade publications, reports. Comes with a companion eBook collection

- Read It!

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: EBSCO Package #1

DATE: May 10, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

- For middle and high school students needing adapted reading materials for school subjects. Has resources to help build background knowledge, conduct research and improve study skills
- This is a very useful and unique resource

- Science Reference Source
 - full text science magazines, journals, and high-quality videos. Also contains science experiments, curriculum-aligned lesson plans, and an image collection. Comes with a companion eBook collection
 - Primary and secondary school libraries

- e. Academic Resources
 - Package 1 exceeds RFP requirements

 - Academic Search Complete
 - Very comprehensive academic database
 - Updated daily
 - 8,979 full text journals, 87% peer reviewed

 - Applied Science & Technology Source
 - diverse array of full-text and indexed content covering all STEM fields
 - Updated daily

 - Associates Programs Source Plus
 - designed specifically for the research needs of two-year college students
 - Thousands of full-text journals covering the most relevant subjects for associates programs.
 - Updated daily
 - Unique, useful, relevant resource

 - Business Source Complete
 - full-text content and peer-reviewed business journals covering all disciplines of business
 - has applicability to small business and general interest categories as well

 - Engineering Source

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

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DATE: May 10, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

- Comprehensive engineering database covering all aspects of engineering. hundreds of full-text engineering journals, magazines, trade publications, plus books, conference papers
 - Environment Complete
 - Comprehensive full text scholarly database for environmental studies.
 - Food Science Source
 - Comprehensive full text scholarly database for food industry
 - Also useful for workforce development in food prep and agribusiness
 - Health Source: Nursing-Academic Ed.
 - Comprehensive full text scholarly database for nursing and allied health
 - Humanities Source
 - Comprehensive, full text, indexing and abstracts of humanities journals and magazines
 - MEDLINE with Full Text
 - Provides full text of hundreds of top biomedical and health journals indexed in MEDLINE
- f. Small Business Resources
- Together, these resources clearly meet the RFP requirements
- Accel5 Business Book Summaries & Videos
 - Book summaries and expert videos cover industry topics focusing on soft skills
 - best practices from leading industry experts
 - updated weekly
 - provided in multiple formats
 - a unique and useful resource for small businesses owners
 - Entrepreneurial Studies Source
 - Comprehensive resources for business owners

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: EBSCO Package #1

DATE: May 10, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

- Academic journals, magazines, trade publications, company profiles, eBooks, industry reports, market research reports, SWOT analyses, videos
- Small Business Source
 - includes business videos, case studies, help and advice, a start-up kit, market research reports, tips for writing business plans, more. Comes with a companion eBook collection
- g. Reference eBooks/ Resources
 - No separate package, but many of the resources come with companion eBooks.
 - 21,000+ eBooks
 - Exceeds RFP requirements
- h. Career, College, & Workforce Building Skills
 - Exceeds RFP requirements
 - Learning Express Library Complete
 - Very comprehensive e-learning suite for building practical, academic and career skills
 - resources for 4th grade through adults
 - Academic and educational skill-building
 - Career exploration and job search
 - Standardized and occupational test preparation
 - Job and internship postings
 - Excellent, all encompassing learning tool for most ages and needs
 - Can take several months for test prep materials to update
 - Vocational & Career Collection
 - full-text coverage for trade and industry-related periodicals for high schools, community colleges, trade institutions and the general public

B. Scope of Services – Additional Content Resources

All freely available

Many are indexed without full text

Having them included will raise awareness of the resources

- EBSCO eBooks Open Access Collection

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: EBSCO Package #1

DATE: May 10, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

- Open Access content curated by the EBSCO collection development team
- Many subjects covered

- European Views of the Americas
 - free archive of indexed publications related to the Americas and written in Europe before 1750
 - thousands of primary source docs

- Exploring Race in Society
 - Free research database covering race and EDI issues
 - General public, academic and high school audiences

- GreenFILE
 - free research database covering all aspects of human impact to the environment
 - general public interest

- LISTA
 - Free research database for LIS topics
 - provides indexing and abstracting for hundreds of key journals, books and research reports

- Teacher Reference Center
 - Complimentary database providing indexing and abstracts for more than 230 peer-reviewed ed journals

II. **Appendix G** – Response to Proposed Services Form

Part II, Scope of Services to be Provided

For EBSCO-provided 3rd party resources, many options are more limited.

A.1. Content

- Libraries in ME would get discounts on EBSCO products they purchase separately—a plus
- Libraries would get prorated credits on current subscriptions they have to products included in package, to be used in 12 months—somewhat limiting
- Providing 3 package options, plus the opportunity to custom design a package—a big plus

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: EBSCO Package #1

DATE: May 10, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

- High curation standards, well considered, strong inclusion of on the ground experts

A.2. Interface

- EBSCOHost interface
- Explora interface: designed for school and public library usage
- Both will search all databases included in the library profile, with de-duped results, sorted by relevance
- Moving to a new interface in July 2025
- Robust search capabilities
- supports Google Classroom and MS OneDrive integration
- compatible with Canvas, Blackboard, Moodle, Desire2Learn (Brightspace) and Schoology LMS
- does not currently integrate electronic course reserve systems into main interfaces but might in the future
- bookmarking is very easy
- main interface can be translated into 31 languages
- main interface has text to speech capability
- interfaces designed to be ADA compliant. Strive to comply with WCAG standards
- sounds like the new interface will not have any one to one help options—a big negative

A.3. Authentication

- provides geoauth only for their products, very limiting

A.4. Statistics and Reporting

- Robust array of reports available including COUNTER
- Stats available at the individual library and consortia levels. They can be broken down by institution, library type and more
- COUNTER 5 and SUSI compliant

A.5. Training and Marketing

- Only 6 customized online trainings per year included—very limited. In person training available for an additional fee
- Have 40 trainers on staff
- Dedicated training rep and marketing rep for Maine
- Provide free online synchronous trainings regularly, not customized
- Will provide a customized training plan for DML

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: EBSCO Package #1

DATE: May 10, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

- Many synchronous online training materials are available for no extra cost
- Marketing materials available, some customizable
- Limited branding options will be available in the new interface

A.6. Discovery, Metadata, Linking, and Branding

- Branding options with logos for individual libraries
- Options to integrate with Springshare products
- Support Open URL
- Provide MARC records

A.7. Support and Service

- Tech support available 24/7 by phone and online
- In 2023, 99.9% uptime. Guaranteed uptime of EBSCOHost and Explora 99.9%
- Provide privacy policy statements for the products
- Many products certified compliant with the ISO 27001 security framework

B.1. Additional Services

Rehashing of previously mentioned services

III. **Appendix H** – Technical Assessment Form Complete answers

Package 1: missing academic business resource. 3 sections exceed requirements, 5 met

Package 2:

Package 3: 5 of 8 exceed requirements

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Ebsco - Package 1

DATE: May 9, 2024

EVALUATOR NAME: Heidi Cook

EVALUATOR DEPARTMENT: RSU5/Freeport High School

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

File 1 – Preliminary Information

- I. **Appendix A – Cover Page**
Submitted as required: Y/N
Yes
- II. **Appendix B – Debarment, Performance, and Non-Collusion Certification Form**
Submitted as required: Y/N
Yes

File 2 – Organization Qualifications & Experience

- I. **Appendix C – Qualifications & Experience Form**
Extensive experience in print and electronic
- II. Subcontractors
None used for this contract. subprocessors support business operations
- III. Organizational Chart
Provided with supporting info about key players
- IV. Litigation
No litigation
- V. Licensure/Certification (none required)
provided
- VI. Certificate of Insurance
provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Ebsco - Package 1

DATE: May 9, 2024

EVALUATOR NAME: Heidi Cook

EVALUATOR DEPARTMENT: RSU5/Freeport High School

File 3 – Proposed Services and Technical Assessment

I. **Appendix F** – Proposed Content Template

A.1. Scope of Services to be Provided: Content

- overview: “strict vetting processes in place to minimize the inclusion of predatory content in our open access and paid offerings” (P)
- excellent chart showing “overview of the full-text types and quantities available” (P)
- updating ranges from multiple times a day to annually depending on resource (P)
- References specific aspects of nonK-12 resources which address Maine Learning Results (P)
- Many databases have extensive eBook collections: publication dates appear to be appropriate for collection (e.g. Health collections are mostly last couple of years, craft & homeowner collections have a larger span going back ~10 years) (P)
- EBSCO taxonomy (300,000+ topical terms)
- Explanation of how new concepts are added and term assigned (P)
- Integration with digital learning environments, including Google Classroom (P)
- Citation integration robust: 9 standard formats which export to major citation tools (including RIS format) (P)
- Additional resources include *European Views of the Americas: 1493-1750*
- *Exploring Race in Society* database also included
- *Teacher Reference Center* (P)

a. General Interest Resources

- Magazines include *The New Yorker*, *Atlantic Monthly*, *New York Review of Books* (P)
- Consumer Health eBooks: 2019 -2023 (P)
- Nolo Press is major source for Legal Info resource (P)

b. Newspapers

- Includes *New York Times* (P)
- Includes 5 major Maine newspapers: PPH, BD,MS, KJ, SJ (P)
- Confusing: “Newspaper Source Plus does not include any images or video content” then “Newspaper Source Plus also includes 2,307,943 images” Did first sentence here mean to say “audio” rather than images?” (Q)

c. Readers Advisory

- 17k audiobook samples (P)

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: RSU5/Freeport High School

- 25+ librarians on staff (P)
- Readers Advisory of choice with proven track record (P)
- Librarians across Maine already use and rely on this resource. (P)
- Deep categories which allow users to find materials by wide range of descriptors. Users do not have to depend on algorithm (P)

d. Prek-12 Resources

Exceeds

- Would like to know more about Explora interface, the student-friendly search interface for EBSCO products (e.g. grade level adjustable? customizable at state and/or site levels? Does this include all resources or only K-12 designated ones?) (Q)
- Includes K-8 eBook collection: Cricket Media (950 eBooks)
- “This integration works with any LTI v1.3 compliant product. Currently, EBSCO’s LTI tool has been fully integrated, tested and confirmed compatible with Canvas, Blackboard, Moodle, Desire2Learn and Schoology LMS platforms. LTI integration may also be possible with other v1.3 compliant LMSs, if the administrator knows how to configure the proper URLs within the LMS and EBSCO’s administrative module, based on the LTI v1.3 specification. Other LMSs will continue to be evaluated for integration.” (P)
- Google for Education Partner status (P)
- Literary Reference Plus includes full text of many classic works (P)
- *Points of View* database excellent for supporting high school students researching current events and controversial topics. (P)
- Read it! for emerging readers and has ELL specific resources at three levels. Useful for New Mainers. (P)
- Science Reference include experiments. Are these 3D?

e. Academic Resources

Exceeds

- Academic Search Complete is a key resource for most (all?) ME colleges and universities. (P)
- Academic Search Complete would be highly useful for secondary school students. (P)
- Did variety of searches in Academic Search Complete via trial and found excellent results: high degrees of relevance, precision, and currency. (P)
- Poetry & Short Story Reference Source includes many classic & contemporary literary works in addition to literary criticism and supporting information.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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BIDDER NAME: Ebsco - Package 1

DATE: May 9, 2024

EVALUATOR NAME: Heidi Cook

EVALUATOR DEPARTMENT: RSU5/Freeport High School

- Is Engineering Source a key resource for schools offering engineering?
(Q)

- Food Science Source?

f. Small Business Resources

Exceeds

g. Reference eBooks/ Resources

- Covered extensively throughout proposal (P)

h. Career, College, & Workforce Building Skills

- Exceeds
- Resources in Learning Express are extensive and up-to-date (P)
- Resources in Learning Express are for nearly all ages and stages (P)

B. Scope of Services – Additional Content Resources

II. **Appendix G** – Response to Proposed Services Form

Part II, Scope of Services to be Provided

A.1. Content

- Discussion of discounts available to libraries who already subscribe to EBSCO databases: credit for any duplicate resources would be given allowing for additional resources or upgrades to be used within 12 months (P)
- Willingness to adjust packages further (P)
- “EBSCO research databases have built-in controls that allow each school or library to make content inclusion decisions independently—above and beyond the level of curation done by EBSCO.”
- Majority of subject matter experts have Master’s degrees aligning with database subject line (P)
- Trials available!
-

A.2. Interface

- EBSCOHost (flagship) & Explora (public library, primary school & secondary school editions).
- Users can create projects, save searches & track liked items “My Dashboard” (P)
- PDFs are actual article PDFs in many cases (P)
- There are some articles that are HTML text download only. “[Lost Roman Resort](#)” in Archaeology (*History Reference Source*) references 10 color photos and a map, none of which are included. (N)
- Extensive pre and post search limiters. (P)

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Ebsco - Package 1

DATE: May 9, 2024

EVALUATOR NAME: Heidi Cook

EVALUATOR DEPARTMENT: RSU5/Freeport High School

- When switching from basic to advanced search, terms and limiters selected in basic carry over to advanced. (P)
- “SmartText search” coming soon. Seems like this will support less experienced searchers in carrying out complex searches (I and P)
- Saved searches and items are in “My dashboard” If logged in with individual acct, this persists, if not, only available during a particular search session. (P)
- Bookmarking is very easy for records and searches (P)

A.3. Authentication

A.4. Statistics and Reporting

A.5. Training and Marketing

- 6 custom sessions annually
- no in-person training included

A.6. Discovery, Metadata, Linking, and Branding

- High level of customization & branding available for most products
- EBSCO Experience Manager (EEM) available at site level to consortium members. Would this apply to sites in Maine using DML?

A.7. Support and Service

- 24/7 customer support (P)
- EBSCO Connect support site for customers/users is robust. (P)
- EBSCO Academy for in-depth training (P)

B.1. Additional Services

III. **Appendix H** – Technical Assessment Form

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: EBSCO Package 1 — Complete Package

DATE: May 10, 2024

EVALUATOR NAME: Jenna Davis

EVALUATOR DEPARTMENT: Maine State Library

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department’s RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

File 1 – Preliminary Information

- I. **Appendix A – Cover Page**
Submitted as required: *Yes*

- II. **Appendix B – Debarment, Performance, and Non-Collusion Certification Form**
Submitted as required: *Yes*

File 2 – Organization Qualifications & Experience

- I. **Appendix C – Qualifications & Experience Form**
Extensive history, very experienced vendor. Has done ample work with a wide variety of library types. Provided project summaries.

- II. Subcontractors
Vendor states that subcontractors “...will not be engaged in relation to this contract proposal”.

- III. Organizational Chart
Team-based with key personnel. Contact information provided.

- IV. Litigation
None.

- V. Licensure/Certification (none required)
ISO 27001.

- VI. Certificate of Insurance
Included evidence of coverage.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: EBSCO Package 1 — Complete Package

DATE: May 10, 2024

EVALUATOR NAME: Jenna Davis

EVALUATOR DEPARTMENT: Maine State Library

File 3 – Proposed Services and Technical Assessment

I. **Appendix F** – Proposed Content Template

A.1. Scope of Services to be Provided: Content

a. General Interest Resources

Range of interests are covered: legal, health, automotive, etc. Variety of audience levels covered. Note Auto Repair Source does not include video. Several sources come with companion Reference eBook Collection.

b. Newspapers

Includes Newspaper Source Plus. Over 500 titles. Includes Kennebec Journal, Portland Press Herald, Bangor Daily News, Sun Journal.

c. Readers Advisory

Novelist K-8 Plus and Novelist Plus. Targeted search based on appeal list. Recommended read lists include recommended grade levels. “May” support Maine Learning Results, which are linked.

d. Prek-12 Resources

Variety of topics. ERIC interface, ReadIt! (includes adapted reading material), science (experiments), biographies, etc. Covers range of age groups. Vendor states they offer integration with LTI v.1.3 compliant systems, including common LMS, as well as share-to Google Classroom options, and single sign-in with Google or Clever SSO.

e. Academic Resources

Vendor states they “...offer fully formatted citations, as well as Export options for working with popular citation tools, such as EasyBib, RefWords, EndNote, Noodle Tools and other tools that support RIS formats.” Humanities Source. Note that package one (complete) offers MEDLINE as well as Academic Search Complete.

f. Small Business Resources

Entrepreneurial Studies Source is listed as being research focused with industry reports, market research, etc. Small Business Source contains business launch and growth tools; marketing, writing a business plan, etc. Good to see side-by-side.

g. Reference eBooks/ Resources

Variety listed in different areas. Include Poetry & Short Story Reference Source, Science Reference Source, associated ebooks.

h. Career, College, & Workforce Building Skills

Learning Express Library Complete, Vocational & Career Collection. Note that Learning Express includes PrepSTEP and Job & Career Accelerator modules. Variety of exam prep options including ACT, GRE, LSAT, MCAT, etc.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: EBSCO Package 1 — Complete Package

DATE: May 10, 2024

EVALUATOR NAME: Jenna Davis

EVALUATOR DEPARTMENT: Maine State Library

B. Scope of Services – Additional Content Resources

EBSCO eBooks Open Access Collection (interface), European Views of the Americas, Exploring Race in Society, GreenFILE, LISTA, Teacher Reference Center

MyHeritage (genealogical information) listed as optional add-on.

II. **Appendix G** – Response to Proposed Services Form

Part II, Scope of Services to be Provided

A.1. Content

Vendor states in General Interest Resources section (Appendix F) that “... When titles are removed from a database, EBSCO seeks replacement content of a similar or higher relative value. As such, there are no price adjustments for regular content additions or removals, and EBSCO will continue to add content monthly.”

Offer to integrate current MyHeritage subscription.

Vendor states that “...should the MSL choose to partner with EBSCO, libraries throughout the state would be eligible for discounts when subscribing to additional EBSCO databases and database upgrades.”

Customizable.

A.2. Interface

Basic and modified/advanced search features. Language support, accessibility functions are detailed. Many examples. Can create alerts via email. No RSS. Can create persistent links. Vendor provides examples of commitment to “continuous improvement of our accessibility...”

A.3. Authentication

Supports a variety of required methods. Geolocation, IP (EZ Proxy, via OIT), SSO, shared authentication, etc.

A.4. Statistics and Reporting

COUNTER Reports, Top Search Terms Reports and Statistical Analytics Reports. Variety of options, including consortia-specific data. Download format may vary.

A.5. Training and Marketing

Detailed training plan and dedicated staff member via vendor.

A.6. Discovery, Metadata, Linking, and Branding

Provides free marketing materials, printables, digital elements, etc. Plug and play options, integration with Libguides, chat, etc. MARC.

A.7. Support and Service

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: EBSCO Package 1 — Complete Package

DATE: May 10, 2024

EVALUATOR NAME: Jenna Davis

EVALUATOR DEPARTMENT: Maine State Library

Comprehensive support; 24/7.

B.1. Additional Services

Summary.

III. **Appendix H** – Technical Assessment Form

Review by Bill Wheeler. Notes IT contract area edited within file 3.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Ebsco: Package 1 – The Complete Package

DATE: May 8, 2024

EVALUATOR NAME: Tim Morton

EVALUATOR DEPARTMENT: Bowdoin College

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department’s RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

File 1 – Preliminary Information

- I. **Appendix A – Cover Page**
Submitted as required: Y

- II. **Appendix B – Debarment, Performance, and Non-Collusion Certification Form**
Submitted as required: Y

File 2 – Organization Qualifications & Experience

- I. **Appendix C – Qualifications & Experience Form**
P – online resources since 1995
P – numerous statewide contracts including KY, RI, CT

- II. Subcontractors
None

- III. Organizational Chart
Included in main overview and complete

- IV. Litigation
None

- V. Licensure/Certification (none required)
ISO 27001 certificate included

- VI. Certificate of Insurance
Included

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Ebsco: Package 1 – The Complete Package

DATE: May 8, 2024

EVALUATOR NAME: Tim Morton

EVALUATOR DEPARTMENT: Bowdoin College

File 3 – Proposed Services and Technical Assessment

I. **Appendix F** – Proposed Content Template

A.1. Scope of Services to be Provided: Content

Common

I – 7,740,546 titles/items

P – unified indexing/metadata across databases

P – integration with systems, printing, and citation export across databases

P – institutions can suppress A&I-only content

a. General Interest Resources

I – 2,477,594 titles/items

Alt HealthWatch

I – contains complementary and alt-health information

Q – is info reviewed for accuracy/datedness?

P – low % of embargoed titles

Auto Repair Source

N – no video content (p.17)

I – content comparison with other databases included

Consumer Health Complete

I – general health database

P – variety of content

Q – what is overlap with Alt HealthWatch?

N – large % of embargoed titles (p.20)

Q – is info reviewed for accuracy/datedness?

Hobbies & Crafts Source

P – companion reference collection

I – larger amount of multimedia content vs. print (p.26)

Home Improvement Source

P – companion reference collection

I – very large amount of multimedia content vs. print (p.30)

Legal Information Source

Q – how are books provided through Nolo? (p.30)

MasterFILE Complete

I – general database aimed at public libraries

I – medium % of embargoed journals (p.36-37)

Small Engine Repair Source

I – small engine reference database

b. Newspapers

Newspaper Source Plus

I – 1,192 titles

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Ebsco: Package 1 – The Complete Package

DATE: May 8, 2024

EVALUATOR NAME: Tim Morton

EVALUATOR DEPARTMENT: Bowdoin College

P – daily updates

N – 77% of titles inactive

P – zero embargoed titles

Q – claims not to include images, but also includes 2.3M images?
(p.49)

I – 5 ME newspapers

c. Readers Advisory

NoveList Plus

P – can browse by genre plus limiters like lexile range, awards,
author nationality/identity/gender

I – info for 650,000+ books, adds 25,000/yr

I – separate taxonomy from other Ebsco products

NoveList K-8 Plus

P – can browse by genre plus limiters like lexile range, awards,
author nationality/identity/gender

P – simplified interface for younger users

I – information on 175,000 titles

d. Prek-12 Resources

I – 4,882,276 titles/content items

Biography Reference Source

Q – “static” update frequency, but contains active journals (p.61)

I – lengthy explanation of K-12 learning standards, may be generic

I – lengthy explanation of support materials, may be generic

EBSCO eBooks Cricket Media Subscription Collection

I – K-8 ebook collection, spans 1995-2020

ERIC

I – resource for K-12 educators

I – 3rd party licensed resource

History Reference Source

I – covers both US and World History

N – large % of embargoed titles

Literary Reference Plus

I – multiple formats covering multiple genres and eras

N – medium % of embargoed titles

MAS Complete

I/Q – general database, difference from other offered databases?

Middle Search Plus

I – middle school focused database

P – low % of embargoed titles

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INDIVIDUAL EVALUATION NOTES**

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Poetry & Short Story Reference Source

I – poems, short stories, and related lesson plans, etc

P – low % of embargoed titles

Points of View Reference Source

I – offers multiple sides of current issues

Primary Search

I – elementary school level content database

P – zero embargoed titles

Q – special interface for younger users?

Professional Development Collection

I – designed for educators

N – large % of embargoed titles

Read It!

I – adaptive reading material for MS/HS

Science Reference Source

I – general science/math reference database

N – medium % of embargoed titles

e. Academic Resources

I – 4,361,138 titles/content items

I – 4x academic journals, case studies vs Elite, nearly 2x Premier

Q – what is content overlap between these various databases?

Academic Search Complete

I – general academic database

N – medium % of embargoed titles

N – large % of OA titles

N – large % of inactive titles

Applied Science & Technology Source

I – research database covering STEM

N – medium % of embargoed and OA titles

Associates Programs Source Plus

I – database designed for two-year colleges

N – low % of peer-reviewed titles

Business Source Complete

I – covers all business fields

N – medium % of peer-reviewed and embargoed titles

Engineering Source

I – engineering database

N – medium % of embargoed and OA titles

Environment Complete

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: May 8, 2024

EVALUATOR NAME: Tim Morton

EVALUATOR DEPARTMENT: Bowdoin College

- I – environmental studies, sustainability, etc
- N – medium % of embargoed and OA titles
- Food Science Source
 - I – all aspects of the food industry
 - N – medium % of embargoed and OA titles
- Health Source: Nursing – Academic Edition
 - I – nursing and allied health database
 - N – large % of embargoed titles, worrying for health database
- Humanities Source
 - I – interdisciplinary humanities coverage
 - N – medium % of embargoed titles
- MEDLINE with Full Text
 - I – widely-used health sciences database
 - P – very high % of full-text titles
 - N – high % of embargoed titles
- f. Small Business Resources
 - I – 2,335,755 titles/content items
 - Accel5 Business Book Summaries & Videos
 - I – book summaries and videos on leadership and business
 - Q – book summaries like CliffsNotes?
 - Q – not included in package summary in first pages?
 - Entrepreneurial Studies Source
 - I – database on entrepreneurship and small business
 - Medium % of embargoed and OA titles
 - Small Business Source
 - I – database aimed at small businesses
 - N – low % of peer-reviewed titles
- g. Reference eBooks/ Resources
 - Nothing specifically submitted, integrated throughout other areas
- h. Career, College, & Workforce Building Skills
 - LearningExpress Library Complete
 - I – database for 4th grade and up, 3,350 resources
 - I – life skills, academic skills, test prep, career exploration
 - P – customized interfaces for different audiences
 - I – separate indexing/metadata than other databases
 - Vocational & Career Collection
 - I – database for HS, CC, Vo-Tec
 - N – low % of peer-reviewed titles

**STATE OF MAINE
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EVALUATOR DEPARTMENT: Bowdoin College

B. Scope of Services – Additional Content Resources

EBSCO eBooks Open Access Subscription Collection

I – curated OA ebook content, 14,155 titles

European Views of the Americas: 1493 to 1750

I – European publications about the Americas

I – index-only resource

Exploring Race in Society

I – free research database on race and society

I – mix of original essays and existing articles/reports

GreenFILE

I – free database on human impact to the environment

I – journals and magazines

Library Information Science & Technology Abstracts (LISTA)

I – database covering library & information science

I – index-only resource

Teacher Reference Center

I – database specifically for teachers

I – abstracts/indexing only

II. **Appendix G** – Response to Proposed Services Form

Part II, Scope of Services to be Provided

A.1. Content

I – three different package offerings

P – discounts for libraries that upgrade to higher tiers of subscribed products

P – credits for libraries that currently subscribe to identical databases

P – overview of curation practices for database content

A.2. Interface

P – addressed and supports all requested functionality (A.2.1, A.2.2)

P – can search multiple EBSCOhost databases simultaneously

P – extensive printing/downloading/exporting options

P/N – citation export on EBSCOhost databases, but not all others (A.2.5)

P – supports multiple LMS and related systems (A.2.6)

N – no e-reserve integration, relies on manual workflows (A.2.7)

P/N – EBSCOhost databases have good connectivity with discovery systems, others do not (A.2.8)

P/N – bookmarking, persistent links, alerts available on 3 of 5 platforms (A.2.9)

P – libraries can customize authentication for alerts, shared links, etc

P – custom interface for public/school libraries

P/N – EBSCOhost and MyHeritage have extensive translations, others don't

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

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DATE: May 8, 2024

EVALUATOR NAME: Tim Morton

EVALUATOR DEPARTMENT: Bowdoin College

P/N – Text-to-speech on EBSCOhost platform only

P – platforms are accessible and VPATs have been included

A.3. Authentication

P – numerous authentication options including geolocation

P – authentication can apply at database, title, or article level

P – URL builder to allow librarians to share content with patrons

A.4. Statistics and Reporting

P – EBSCOhost platform COUNTER data available and SUSHI-compliant

N – Auto Repair Source and MyHeritage require emails to Ebsco for stats

N – other platforms have non-COUNTER data

P – stats available for institutions and statewide with customizable timeframes

P – all stats available as Excel files

A.5. Training and Marketing

N – 6 training sessions per year, additional training is additional cost

P – virtual training available, both live and recorded

P – dedicated training specialist

P – provides digital and physical marketing materials

P – dedicated marketing representative

P – branding options of 4 of 5 platforms

A.6. Discovery, Metadata, Linking, and Branding

P/N – lots of widgets for EBSCOhost platform, more limited elsewhere

P/N – interface customization on EBSCOhost, limited on other platforms

P – branding options of 4 of 5 platforms

P – supports OpenURL standards for platforms where it's relevant

P/N – MARC records only for EBSCOhost and LearningExpress

P/N – Only EBSCOhost platform indexed by Google Scholar

A.7. Support and Service

P – 24/7 tech support, 70% cases resolved same day

P – 99.5% uptime on all platforms

I – links to numerous privacy policies

P – links to roadmaps and intended enhancements

P – quick implementation for current Ebsco customers

B.1. Additional Services

Can offer other services like discovery, authentication, etc

III. Appendix H – Technical Assessment Form

They appear to comply with state IT requirements

VPATs provided for products

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: EBSCO Package #1

DATE: 5/10/2024

EVALUATOR NAME: Tim Pellett

EVALUATOR DEPARTMENT: Maine InfoNet

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

File 1 – Preliminary Information

- I. **Appendix A – Cover Page**
Submitted as required:

- II. **Appendix B – Debarment, Performance, and Non-Collusion Certification Form**
Submitted as required:

File 2 – Organization Qualifications & Experience

- I. **Appendix C – Qualifications & Experience Form**
 - Established over 80 years ago
 - Provided online content since 1995
 - Long term provider for State of Maine
 - Robust experience working with large consortia and all library types
 - Has over 3,000 employees worldwide – what is break down for online services?

- II. Subcontractors
 - Provided – meets RFP requirements

- III. Organizational Chart
 - Provided – meets RFP requirements

- IV. Litigation
 - Provided – meets RFP requirements

- V. Licensure/Certification (none required)
 - Provided – meets RFP requirements

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: EBSCO Package #1

DATE: 5/10/2024

EVALUATOR NAME: Tim Pellett

EVALUATOR DEPARTMENT: Maine InfoNet

- VI. Certificate of Insurance
- Provided – meets RFP requirements.

File 3 – Proposed Services and Technical Assessment

I. **Appendix F** – Proposed Content Template

A.1. Scope of Services to be Provided: Content

- Easy to navigate charts
- Package differences in academic resources
- Extensive eBook resources, pub dates are within last few years
- Strict vetting process for new content

Package 1 (complete package)

a. General Interest Resources

- Same as package 2 and 3.
- Meets RFP requirements
- Legal provided through NOLO press, recently published eBooks
- Magazine full-text includes New Yorker, Atlantic Monthly
- Acknowledged limitations

b. Newspapers

- Same as package 2 and 3.
- Meets RFP requirements
- Includes 5 Maine newspapers
- 75% of content includes inactive titles
- International titles

c. Readers Advisory

- Same as package 2 and 3.
- Exceeds RFP requirements
- Created by librarians for librarians
- Over 17,000 audio book samples
- Robust support materials
- Industry leader advisory tool

d. Prek-12 Resources

- Same as package 2 and 3.
- Exceeds RFP requirements

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: EBSCO Package #1

DATE: 5/10/2024

EVALUATOR NAME: Tim Pellett

EVALUATOR DEPARTMENT: Maine InfoNet

- Integrates with LMS
- Google for Education partner
- Program for emerging readers called ReadIt
- Science reference includes experiments
- 950 eBook titles - robust and up to date.

e. Academic Resources

- Includes 8 additional databases listed under academic.
- Exceeds RFP requirements
- Academic Source and Business Source used by high schools and college

f. Small Business Resources

- Same as package 2 and 3.
- Meets RFP requirements
- May exceed requirements in package 1

g. Reference eBooks/ Resources

- Did not answer this category by itself, embedded in other content area descriptions.

h. Career, College, & Workforce Building Skills

- Same as package 2 and 3
- Meets RFP requirements
- Extensive variety of prep exams
- Lag time in getting newest exams

B. Scope of Services – Additional Content Resources

- Six additional databases, freely available on internet. Not full text

II. **Appendix G** – Response to Proposed Services Form

Part II, Scope of Services to be Provided

A.1. Content

- Three database packages. Price based on overall content, additional configuration possible.
- MyHeritage is being offered separately and is optional.
- Discount offered to other Maine libraries if EBSCO receives award
- Will offer credit to libraries with duplicate subscriptions, however they expire 12 months after start date of DML contract.
- Trial info provided

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: EBSCO Package #1

DATE: 5/10/2024

EVALUATOR NAME: Tim Pellett

EVALUATOR DEPARTMENT: Maine InfoNet

- EBSCO Connect for webinars, tutorials, FAQ, LibGuides etc
- Robust search commands/limiters in advanced search
- Good overview of how they curate content
- Flexibility to customize packages

A.2. Interface

- Explora interface for K-12 audience
- Persistent links
- Integrate with Google and Microsoft products.
- Text to speech functionality
- Predictive search, auto-suggest, spell check
- Cross searching, multiple search modes
- Search on Lexile number or age group
- Integrates with LTI products – Brightspace BB, Moodle etc

- EBSCO is a Discovery provider
- EBSCO content integrates with other discovery systems
- Supports Open URL
- Interface has 31 language translations
- ADA/508 compliant
- Personal accounts (MyEBSCO)

A.3. Authentication

- Supports a variety of auth options – IP, EZProxy, OpenAthens
- Geo auth is limited to EBSCO products only
- Cannot provide geo auth system we have now

A.4. Statistics and Reporting

- COUNTER 5 and non-COUNTER usage reports
- Offers SUSHI
- Robust interface and report options and configuration
- Cannot provide library specific usage without an account

A.5. Training and Marketing

- Six customized online training session per year at no cost
- EBSCO Academy for acct admins and library staff training
- Robust support and training info at EBSCO Connect

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: EBSCO Package #1

DATE: 5/10/2024

EVALUATOR NAME: Tim Pellett

EVALUATOR DEPARTMENT: Maine InfoNet

- Offers digital and print promotional materials including product buttons and logos with URLs, screensavers, media kits. Bookmarks and handouts. Some items customizable, not sure how much though.

A.6. Discovery, Metadata, Linking, and Branding

- Branding color and logo at state level
- Can have parent/child relationship of accounts (already set that way), but for existing paid accounts.
- Can integrate placards, LibChat, LibGuides, Library3lp
- Marc21 records
- Export holdings to GoogleScholar
- Content is not discoverable in search engines.

A.7. Support and Service

- 24/7 support
- Ticketing system with online interface to track support cases
- Robust support system
- 99.9% uptime although they do have occasional component outages
- Status alerts page
- Utilizing AWS with multiple availability zones

B.1. Additional Services

- Duplication of narrative of content mentioned.

III. Appendix H – Technical Assessment Form

- See notes from Bill Wheeler, State OIT liaison for this RFP.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: EBSCO

DATE: May 11, 2024

EVALUATOR NAME: William Wheeler

EVALUATOR DEPARTMENT: Maine Office of Information Technology

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

While I participated in the meetings, I left the application evaluation to those that are familiar with the library and knew what they needed in the application. I felt I could add very little to this part of the process. I did evaluate Appendix H and my notes for that are below. There was only one Appendix H for all packages submitted by EBSCO.

File 1 – Preliminary Information

- I. **Appendix A – Cover Page**
Submitted as required: Y/N
Yes

- II. **Appendix B – Debarment, Performance, and Non-Collusion Certification Form**
Submitted as required: Y/N
Yes

File 2 – Organization Qualifications & Experience

- I. **Appendix C – Qualifications & Experience Form**
Provided

- II. Subcontractors
No subcontractors used. Subprocessor list supplied.

- III. Organizational Chart
Provided

- IV. Litigation
No litigation to disclose

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: EBSCO

DATE: May 11, 2024

EVALUATOR NAME: William Wheeler

EVALUATOR DEPARTMENT: Maine Office of Information Technology

V. Licensure/Certification (none required)
 Provided

VI. Certificate of Insurance
 Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: EBSCO

DATE: May 11, 2024

EVALUATOR NAME: William Wheeler

EVALUATOR DEPARTMENT: Maine Office of Information Technology

File 3 – Proposed Services and Technical Assessment

I. **Appendix F** – Proposed Content Template

I am not familiar with the State Library, their needs, or whether what was proposed was sufficient. I left the assessment of these areas to those members that could make a far better determination than myself.

A.1. Scope of Services to be Provided: Content

- a. General Interest Resources
- b. Newspapers
- c. Readers Advisory
- d. Prek-12 Resources
- e. Academic Resources
- f. Small Business Resources
- g. Reference eBooks/ Resources
- h. Career, College, & Workforce Building Skills

B. Scope of Services – Additional Content Resources

II. **Appendix G** – Response to Proposed Services Form

I am not familiar with the State Library, their needs, or whether what was proposed was sufficient. I left the assessment of these areas to those members that could make a far better determination than myself.

Part II, Scope of Services to be Provided

- A.1. Content
- A.2. Interface
- A.3. Authentication
- A.4. Statistics and Reporting
- A.5. Training and Marketing
- A.6. Discovery, Metadata, Linking, and Branding
- A.7. Support and Service
- B.1. Additional Services

III. **Appendix H** – Technical Assessment Form

EBSCO did a very good job of answering all the questions presented in Appendix H. They either provided a direct answer to the question or provided information on which attached document to review for the specific answer.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: EBSCO Package #2

DATE: May 10, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

Instructions: *The purpose of this form is to record proposal review notes written by individual evaluators for this Request for Proposals (RFP) process. It is required that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

File 1 – Preliminary Information

- **Appendix A – Cover Page**
Submitted as required: Y

- **Appendix B – Debarment, Performance, and Non-Collusion Certification Form**
Submitted as required: Y

File 2 – Organization Qualifications & Experience

- I. **Appendix C – Qualifications & Experience Form**
 - Impressive 80 years in existence and providing online resources since 1995
 - Mentions serving public, academic, K12 and special libraries
 - Major company with over 3,000 employees
 - Include 3 similar clients—KY, CT, RI
 - Long term provider in Maine, both DML and individual libraries

- II. Subcontractors
No subcontractors will be used for this contract but do use subprocessors.

- III. Organizational Chart
Robust, logical, detailed

- IV. Litigation
Statement of no litigation

- V. Licensure/Certification (none required)
ISO 27001 security framework compliance document provided

- VI. Certificate of Insurance

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: EBSCO Package #2

DATE: May 10, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

Submitted as required, appears adequate

File 3 – Proposed Services and Technical Assessment

I. **Appendix F** – Proposed Content Template

A.1. Scope of Services to be Provided: Content

- Direct linking between products is a plus
- Enhanced LTI integration with school LMS and authentication systems
- Includes open source content, but only charges for paid content
- Libraries can exclude A&I titles to make fully full text content
- majority of most important periodicals have no embargo period
- offers cumulative coverage of indexing, abstracts and full text, including extensive backfiles
- offers integration with LTI v.1.3 compliant systems, including common LMS, as well as share-to Google Classroom options, and single sign-in with Google or Clever SSO
- handy citation tool, and exports to other citation tools
- K12 ties are helpfully mentioned in resources not in the preK-12 category
- Proposal is well organized, easy to navigate

a. General Interest Resources

Meets requirements of RFP

Well rounded selection of topics

- Alt HealthWatch
 - complementary, holistic and integrated approaches to health care and wellness
 - journals and magazines
- Auto Repair Source
 - Content is processed by automotive experts at MOTOR and comes from the Original Equipment Manufacturers. Is a division of Hearst Business Media
 - Designed for touch-enabled devices
 - Updated quarterly
 - No videos, a drawback
- Consumer Health Compete

**STATE OF MAINE
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DATE: May 10, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

- Comprehensive consumer health resource
- Journals, magazines, trade publications, audio, video, reports, diagrams, comes with a companion eBook collection
- Updated weekly

- Hobbies & Crafts Source
 - full-text hobby and craft magazines, journals, hobby profiles, recipes and videos. comes with a companion eBook collection

- Home Improvement Source
 - Academic journals, magazines, trade publications, images. comes with a companion eBook collection
 - Updated weekly
 - Does not include videos

- Legal Information Source
 - full text legal reference works, journals, trade publications, magazines and legal forms for consumers and small businesses
 - updated weekly

- MasterFILE Complete
 - full-text magazines, journals, images, reference books, 75,000 videos from AP, primary sources for the general public. comes with a companion eBook collection
 - updated daily

- Small Engine Repair Source
 - User friendly repair and maintenance guides for all types of small engines
 - Full text reference books with photos and illustrations
 - Updated monthly
 - No multimedia content

- b. Newspapers
Meets RFP requirements
 - Newspaper Source Plus
 - full-text collection of the world's major news content—500+ titles of newspapers and newswires, tv and radio transcripts and ongoing daily updates from popular news sources

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

- update up to 4 times daily
- 16 years average length of back files
- No video content but tv and audio news transcripts are included
- Includes Maine titles: KJ, Bangor Daily News, Morning Sentinel (Waterville), Portland Press Herald, Sun Journal (Lewiston)
- Updates daily but does not specify which publications this includes

c. Readers Advisory

Exceeds RFP requirements

- NoveList Plus and K-8 Plus
 - Leading industry readers advisory tool
 - Covers all genres of fiction and nonfiction, includes samples of audiobooks for previewing
 - Many user friendly ways to browse, including a “Make Your Own Appeal Mix” tool
 - Includes 4 age brackets (Adult, Teen, Ages 9-12 and Ages 0-8)
 - Includes “on the shelf” feature to see if titles are available at your local library
 - Updated weekly, adds 25K new titles each year
 - Created by librarians, for librarians. 25 librarians on staff—a major plus
 - Going on for 30 years
 - Can search by Lexile and AR levels
 - Points out that this aids parents, teachers, librarians, and students directly
 - Product has its own taxonomy, indexing and controlled vocabularies developed in house for user friendliness
 - Robust educational support materials

d. Prek-12 Resources

Exceeds RFP requirements

- Comprehensive
- Align with Common Core standards. Mentions that Maine standards align with Common Core but nothing more specific.
- EBSCO Connect support site provides resources for teachers, educators, administrators, librarians—lesson plans, templates, rubrics, scavenger hunts, training, promo materials, list of funding sources, info literacy etc. Also provides support for students—research, writing, info literacy, etc.

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EVALUATOR DEPARTMENT: Maine State Library

- LTI integration with automatic role provisioning. Fully integrated with Google Classroom, Canvas, Blackboard, Moodle, Desire2Learn and Schoology LMS platforms
- Does it allow simultaneous usage of eBooks?

- Biography Reference Source
 - Thousands of unique biographies. Comes with a companion eBook collection
 - Primary and secondary schools

- EBSCO eBooks Cricket Media Collection
 - eBook collection for preK-8
 - digital access to short-form fiction and nonfiction titles by Cricket Media
 - full text, from 1995
 - updated quarterly
 - specifies alignment with MLR, a plus

- ERIC
 - A licensed index. Indexed and links to full-text education literature and resources, sponsored by the US Department of Education

- History Reference Source
 - Covers all time periods and aspects of global history
 - Primary and secondary schools
 - Journals, magazines, biographies, primary source docs. Comes with a companion eBook collection
 - Updated weekly

- Literary Reference Plus
 - collection of reference works across all genres and time periods. It contains thousands of poems, short stories, classic novels, plot summaries, critical analysis essays, literary journals, reference books and author biographies, plus lesson plans and literary study guides. Comes with a companion eBook collection
 - Primary and secondary schools
 - Updated daily

- MAS Complete
 - Designed for high school libraries.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: Maine State Library

- full text of hundreds of popular magazines and e-books covering a range of topics. Also full-text primary source documents and videos from AP. Comes with a companion eBook collection
 - focus on current events/news

- Middle Search Plus
 - Designed for middle school libraries
 - popular middle school magazines and thousands of primary source documents and videos. Comes with a companion eBook collection
 - focus on current events/news, popular kids' topics

- Poetry & Short Story Reference Source
 - full-text of poems, short stories, biographies, essays, lesson plans and learning guides. It also includes high-quality videos and audio recordings from the Academy of American Poets. Comes with a companion eBook collection
 - primary and secondary school libraries

- Points of View Reference Source
 - Provides resources presenting different views of current topics from magazines and point of view essays
 - Primary and secondary school libraries
 - each topic includes a Guide to Critical Analysis

- Primary Search
 - Elementary school libraries
 - full text for popular children's magazines and encyclopedic entries written specifically for kids. Comes with a companion eBook collection
 - covers a range of popular kids' topics and school subjects

- Professional Development Collection
 - full-text resources for educators, professional librarians and education researchers
 - journals, magazines, trade publications, reports. Comes with a companion eBook collection

- Read It!

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: EBSCO Package #2

DATE: May 10, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

- For middle and high school students needing adapted reading materials for school subjects. Has resources to help build background knowledge, conduct research and improve study skills
- This is a very useful and unique resource

- Science Reference Source
 - full text science magazines, journals, and high-quality videos. Also contains science experiments, curriculum-aligned lesson plans, and an image collection. Comes with a companion eBook collection
 - Primary and secondary school libraries

- e. Academic Resources
Package 2 meets RFP requirements
 - Academic Search Premier
 - Comprehensive academic database
 - Updated daily
 - 4,751 full text journals, 84% peer-reviewed

 - Associates Programs Source
 - designed specifically for the research needs of two-year college students
 - hundreds of full-text journals covering the most relevant subjects for associates programs.
 - Updated daily
 - Unique, useful, relevant resource

 - Business Source Premier
 - full text and searchable cited references for top business journals

 - Computers & Applied Sciences Complete
 - full-text covering computing, technology and engineering disciplines. Especially useful to researchers studying the business and social implications of new technology.

 - Engineering Source
 - Comprehensive engineering database covering all aspects of engineering. hundreds of full-text engineering journals, magazines, trade publications, plus books, conference papers

**STATE OF MAINE
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DATE: May 10, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

- Environment Complete
 - Comprehensive full text scholarly database for environmental studies.
- Health Source: Nursing-Academic Ed.
 - Comprehensive full text scholarly database for nursing and allied health
- Humanities Source
 - full text, indexing and abstracts of humanities journals and magazines

f. Small Business Resources

Together, these resources clearly meet the RFP requirements

- Accel5 Business Book Summaries & Videos
 - Book summaries and expert videos cover industry topics focusing on soft skills
 - best practices from leading industry experts
 - updated weekly
 - provided in multiple formats
 - a unique and useful resource for small businesses owners
- Entrepreneurial Studies Source
 - Comprehensive resources for business owners
 - Academic journals, magazines, trade publications, company profiles, eBooks, industry reports, market research reports, SWOT analyses, videos
- Small Business Source
 - includes business videos, case studies, help and advice, a start-up kit, market research reports, tips for writing business plans, more. Comes with a companion eBook collection

g. Reference eBooks/ Resources

No separate package, but many of the resources come with companion eBooks. 21,000+ eBooks

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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DATE: May 10, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

h. Career, College, & Workforce Building Skills
Exceeds RFP requirements

- Learning Express Library Complete
 - Very comprehensive e-learning suite for building practical, academic and career skills
 - resources for 4th grade through adults
 - Academic and educational skill-building
 - Career exploration and job search
 - Standardized and occupational test preparation
 - Job and internship postings
 - Excellent, all encompassing learning tool for most ages and needs
 - Can take several months for test prep materials to update

- Vocational & Career Collection
 - full-text coverage for trade and industry-related periodicals for high schools, community colleges, trade institutions and the general public

B. Scope of Services – Additional Content Resources

All freely available

Many are indexed without full text

Having them included will raise awareness of the resources

- EBSCO eBooks Open Access Collection
 - Open Access content curated by the EBSCO collection development team
 - Many subjects covered

- European Views of the Americas
 - free archive of indexed publications related to the Americas and written in Europe before 1750
 - thousands of primary source docs

- Exploring Race in Society
 - Free research database covering race and EDI issues
 - General public, academic and high school audiences

- GreenFILE

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EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

- free research database covering all aspects of human impact to the environment
- general public interest

- LISTA
 - Free research database for LIS topics
 - provides indexing and abstracting for hundreds of key journals, books and research reports

- Teacher Reference Center
 - Complimentary database providing indexing and abstracts for more than 230 peer-reviewed ed journals

II. **Appendix G** – Response to Proposed Services Form

Part II, Scope of Services to be Provided

For EBSCO-provided 3rd party resources, many options are more limited.

A.1. Content

- Libraries in ME would get discounts on EBSCO products they purchase separately—a plus
- Libraries would get prorated credits on current subscriptions they have to products included in package, to be used in 12 months—somewhat limiting
- Providing 3 package options, plus the opportunity to custom design a package—a big plus
- High curation standards, well considered, strong inclusion of on the ground experts

A.2. Interface

- EBSCOHost interface
- Explora interface: designed for school and public library usage
- Both will search all databases included in the library profile, with de-duped results, sorted by relevance
- Moving to a new interface in July 2025
- Robust search capabilities
- supports Google Classroom and MS OneDrive integration
- compatible with Canvas, Blackboard, Moodle, Desire2Learn (Brightspace) and Schoology LMS
- does not currently integrate electronic course reserve systems into main interfaces but might in the future

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

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EVALUATOR DEPARTMENT: Maine State Library

- bookmarking is very easy
- main interface can be translated into 31 languages
- main interface has text to speech capability
- interfaces designed to be ADA compliant. Strive to comply with WCAG standards
- sounds like the new interface will not have any one to one help options—a big negative

A.3. Authentication

- provides geoauth only for their products, very limiting

A.4. Statistics and Reporting

- Robust array of reports available including COUNTER
- Stats available at the individual library and consortia levels. They can be broken down by institution, library type and more
- COUNTER 5 and SUSHI compliant

A.5. Training and Marketing

- Only 6 customized online trainings per year included—very limited. In person training available for an additional fee
- Have 40 trainers on staff
- Dedicated training rep and marketing rep for Maine
- Provide free online synchronous trainings regularly, not customized
- Will provide a customized training plan for DML
- Many synchronous online training materials are available for no extra cost
- Marketing materials available, some customizable
- Limited branding options will be available in the new interface

A.6. Discovery, Metadata, Linking, and Branding

- Branding options with logos for individual libraries
- Options to integrate with Springshare products
- Support Open URL
- Provide MARC records

A.7. Support and Service

- Tech support available 24/7 by phone and online
- In 2023, 99.9% uptime. Guaranteed uptime of EBSCOHost and Explora 99.9%
- Provide privacy policy statements for the products

**STATE OF MAINE
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EVALUATOR DEPARTMENT: Maine State Library

- Many products certified compliant with the ISO 27001 security framework

B.1. Additional Services

Rehashing of previously mentioned services

III. **Appendix H** – Technical Assessment Form
Complete answers

Package 1: missing academic business resource. 3 sections exceed requirements, 5 met

Package 2:

Package 3: 5 of 8 exceed requirements

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Ebsco - Package 2

DATE: May 9, 2024

EVALUATOR NAME: Heidi Cook

EVALUATOR DEPARTMENT: RSU5/Freeport High School

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

File 1 – Preliminary Information

- I. **Appendix A – Cover Page**
Submitted as required: Y/N
Yes
- II. **Appendix B – Debarment, Performance, and Non-Collusion Certification Form**
Submitted as required: Y/N
Yes

File 2 – Organization Qualifications & Experience

- I. **Appendix C – Qualifications & Experience Form**
Extensive experience in print and electronic
- II. Subcontractors
None used for this contract. subprocessors support business operations
- III. Organizational Chart
Provided with supporting info about key players
- IV. Litigation
No litigation
- V. Licensure/Certification (none required)
provided
- VI. Certificate of Insurance
provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Ebsco - Package 2

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EVALUATOR NAME: Heidi Cook

EVALUATOR DEPARTMENT: RSU5/Freeport High School

File 3 – Proposed Services and Technical Assessment

I. **Appendix F** – Proposed Content Template

A.1. Scope of Services to be Provided: Content

- overview: “strict vetting processes in place to minimize the inclusion of predatory content in our open access and paid offerings”
- excellent chart showing “overview of the full-text types and quantities available”
- updating ranges from multiple times a day to annually depending on resource
- References specific aspects of nonK-12 resources which address Maine Learning Results
- Many databases have extensive eBook collections: publication dates appear to be appropriate for collection (e.g. Health collections are mostly last couple of years, craft & homeowner collections have a larger span going back ~10 years)
- EBSCO taxonomy (300,000+ topical terms)
- Explanation of how new concepts are added and term assigned
- Integration with digital learning environments, including Google Classroom
- Citation integration robust: 9 standard formats which export to major citation tools (including RIS format)
- Additional resources include *European Views of the Americas: 1493-1750*
- *Exploring Race in Society* database also included
- *Teacher Reference Center*

a. General Interest Resources

- Magazines include *The New Yorker*, *Atlantic Monthly*, *New York Review of Books*
- Consumer Health eBooks: 2019 -2023
- Nolo Press is major source for Legal Info resource

b. Newspapers

- Includes *New York Times* (P)
- Includes 5 major Maine newspapers: PPH, BD,MS, KJ, SJ (P)
- Confusing: “Newspaper Source Plus does not include any images or video content” then “Newspaper Source Plus also includes 2,307,943 images” Did first sentence here mean to say “audio” rather than images?” (Q)

c. Readers Advisory

- 17k audiobook samples (P)

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- 25+ librarians on staff (P)
- Readers Advisory of choice with proven track record (P)
- Librarians across Maine already use and rely on this resource. (P)
- Deep categories which allow users to find materials by wide range of descriptors. Users do not have to depend on algorithm (P)

d. Prek-12 Resources

Exceeds

- Would like to know more about Explora interface, the student-friendly search interface for EBSCO products (e.g. grade level adjustable? customizable at state and/or site levels? Does this include all resources or only K-12 designated ones?) (Q)
- Includes K-8 eBook collection: Cricket Media (950 eBooks)
- “This integration works with any LTI v1.3 compliant product. Currently, EBSCO’s LTI tool has been fully integrated, tested and confirmed compatible with Canvas, Blackboard, Moodle, Desire2Learn and Schoology LMS platforms. LTI integration may also be possible with other v1.3 compliant LMSs, if the administrator knows how to configure the proper URLs within the LMS and EBSCO’s administrative module, based on the LTI v1.3 specification. Other LMSs will continue to be evaluated for integration.” (P)
- Google for Education Partner status (P)
- Literary Reference Plus includes full text of many classic works (P)
- Read it! for emerging readers and has ELL specific resources at three levels.. Useful for New Mainers. (P)
- *Science Reference* include experiments. Are these 3D? (Q)
- *Points of View* database excellent for supporting high school students researching current events and controversial topics. (P)

e. Academic Resources

Exceeds

- Academic Search Premier was a valuable part of MARVEL database collection prior to 7/2018. (P)
- Academic Search Premier is highly relevant for high school students. (P)
- Poetry & Short Story Reference Source includes many classic & contemporary literary works in addition to literary criticism and supporting information.

f. Small Business Resources

Exceeds

g. Reference eBooks/ Resources

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: RSU5/Freeport High School

- Covered extensively throughout proposal
- h. Career, College, & Workforce Building Skills
 - Exceeds
 - Resources in Learning Express are extensive and up-to-date (P)
 - Resources in Learning Express are for nearly all ages and stages (P)

B. Scope of Services – Additional Content Resources

II. **Appendix G** – Response to Proposed Services Form

Part II, Scope of Services to be Provided

A.1. Content

- Discussion of discounts available to libraries who already subscribe to EBSCO databases: credit for any duplicate resources would be given allowing for additional resources or upgrades to be used within 12 months (P)
- Willingness to adjust packages further (P)
- “EBSCO research databases have built-in controls that allow each school or library to make content inclusion decisions independently—above and beyond the level of curation done by EBSCO.” (P)
- Majority of subject matter experts have Master’s degrees aligning with database subject line (P)
- Trials available! (P)
-

A.2. Interface

- EBSCOHost (flagship) & Explora (public library, primary school & secondary school editions. Can user select which option to use? (Q)
- Seems like EBSCOHost & Explora multidatabase search is standard. Can individual databases be selected, as well? (Q)
- Users can create projects, save searches & track liked items “My Dashboard” (P)
- PDFs are actual article PDFs in many cases and can be viewed online as well as downloaded. (P++)
- There are some articles that are HTML text download only. [“Lost Roman Resort”](#) in Archaeology (*History Reference Source*) references 10 color photos and a map, none of which are included.
- Extensive pre and post search limiters. (P)
- When switching from basic to advanced search, terms and limiters selected in basic carry over to advanced. (P)
- “SmartText search” coming soon. Seems like this will support less experienced searchers in carrying out complex searches (P)

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: RSU5/Freeport High School

- Saved searches and items are in “My dashboard” If logged in with individual acct, this persists, if not, only available during a particular search session. (P)
- Bookmarking is very easy for records and searches (P)

A.3. Authentication

A.4. Statistics and Reporting

A.5. Training and Marketing

- 6 custom sessions annually (P)
- no in-person training included

A.6. Discovery, Metadata, Linking, and Branding

- High level of customization & branding available for most products
- EBSCO Experience Manager (EEM) available at site level to consortium members. Would this apply to sites in Maine using DML?

A.7. Support and Service

- 24/7 customer support (P)
- EBSCO Connect support site for customers/users is robust. (P)
- EBSCO Academy for in-depth training

B.1. Additional Services

III. **Appendix H** – Technical Assessment Form

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: EBSCO Package 2—The Premier Package

DATE: May 10, 2024

EVALUATOR NAME: Jenna Davis

EVALUATOR DEPARTMENT: Maine State Library

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department’s RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

File 1 – Preliminary Information

- I. **Appendix A – Cover Page**
Submitted as required: *Yes*

- II. **Appendix B – Debarment, Performance, and Non-Collusion Certification Form**
Submitted as required: *Yes*

File 2 – Organization Qualifications & Experience

- I. **Appendix C – Qualifications & Experience Form**
Extensive history, very experienced vendor. Has done ample work with a wide variety of library types. Provided project summaries.

- II. Subcontractors
Vendor states that subcontractors “...will not be engaged in relation to this contract proposal”.

- III. Organizational Chart
Team-based with key personnel. Contact information provided.

- IV. Litigation
None.

- V. Licensure/Certification (none required)
ISO 27001.

- VI. Certificate of Insurance
Included evidence of coverage.

**STATE OF MAINE
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DATE: May 10, 2024

EVALUATOR NAME: Jenna Davis

EVALUATOR DEPARTMENT: Maine State Library

File 3 – Proposed Services and Technical Assessment

I. **Appendix F** – Proposed Content Template

A.1. Scope of Services to be Provided: Content

a. General Interest Resources

Range of interests are covered: legal, health, automotive, etc. Variety of audience levels covered. Note Auto Repair Source does not include video. Several sources come with companion Reference eBook Collection.

b. Newspapers

Includes Newspaper Source Plus. Over 500 titles. Includes Kennebec Journal, Portland Press Herald, Bangor Daily News, Sun Journal.

c. Readers Advisory

Novelist K-8 Plus and Novelist Plus. Targeted search based on appeal list. Recommended read lists include recommended grade levels. “May” support Maine Learning Results, which are linked.

d. Prek-12 Resources

Variety of topics. ERIC interface, ReadIt! (includes adapted reading material), science (experiments), biographies, etc. Covers range of age groups. Vendor states they offer integration with LTI v.1.3 compliant systems, including common LMS, as well as share-to Google Classroom options, and single sign-in with Google or Clever SSO.

e. Academic Resources

Vendor states they “...offer fully formatted citations, as well as Export options for working with popular citation tools, such as EasyBib, RefWords, EndNote, Noodle Tools and other tools that support RIS formats.” Humanities Source. Note that package two (premier) offers Academic Search Premier.

f. Small Business Resources

Entrepreneurial Studies Source is listed as being research focused with industry reports, market research, etc. Small Business Source contains business launch and growth tools; marketing, writing a business plan, etc. Good to see side-by-side.

g. Reference eBooks/ Resources

Variety listed in different areas. Include Poetry & Short Story Reference Source, Science Reference Source, associated ebooks.

h. Career, College, & Workforce Building Skills

Learning Express Library Complete, Vocational & Career Collection. Note that Learning Express includes PrepSTEP and Job & Career Accelerator modules. Variety of exam prep options including ACT, GRE, LSAT, MCAT, etc.

B. Scope of Services – Additional Content Resources

**STATE OF MAINE
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EVALUATOR DEPARTMENT: Maine State Library

EBSCO eBooks Open Access Collection (interface), European Views of the Americas, Exploring Race in Society, GreenFILE, LISTA, Teacher Reference Center

MyHeritage (genealogical information) listed as optional add-on.

II. Appendix G – Response to Proposed Services Form

Part II, Scope of Services to be Provided

A.1. Content

Vendor states in General Interest Resources section (Appendix F) that “... When titles are removed from a database, EBSCO seeks replacement content of a similar or higher relative value. As such, there are no price adjustments for regular content additions or removals, and EBSCO will continue to add content monthly.”

Offer to integrate current MyHeritage subscription.

Vendor states that “...should the MSL choose to partner with EBSCO, libraries throughout the state would be eligible for discounts when subscribing to additional EBSCO databases and database upgrades.”

Customizable.

A.2. Interface

Basic and modified/advanced search features. Language support, accessibility functions are detailed. Many examples. Can create alerts via email. No RSS. Can create persistent links. Vendor provides examples of commitment to “continuous improvement of our accessibility...”

A.3. Authentication

Supports a variety of required methods. Geolocation, IP (EZ Proxy, via OIT), SSO, shared authentication, etc.

A.4. Statistics and Reporting

COUNTER Reports, Top Search Terms Reports and Statistical Analytics Reports. Variety of options, including consortia-specific data. Download format may vary.

A.5. Training and Marketing

Detailed training plan and dedicated staff member via vendor.

A.6. Discovery, Metadata, Linking, and Branding

Provides free marketing materials, printables, digital elements, etc. Plug and play options, integration with Libguides, chat, etc. MARC.

A.7. Support and Service

Comprehensive support; 24/7.

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B.1. Additional Services

Summary.

III. **Appendix H** – Technical Assessment Form

Review by Bill Wheeler. Notes IT contract area edited within file 3.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Ebsco: Package 2 – The Premier Package

DATE: May 8, 2024

EVALUATOR NAME: Tim Morton

EVALUATOR DEPARTMENT: Bowdoin College

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department’s RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

File 1 – Preliminary Information

- I. **Appendix A – Cover Page**
Submitted as required: Y

- II. **Appendix B – Debarment, Performance, and Non-Collusion Certification Form**
Submitted as required: Y

File 2 – Organization Qualifications & Experience

- I. **Appendix C – Qualifications & Experience Form**
P – online resources since 1995
P – numerous statewide contracts including KY, RI, CT

- II. Subcontractors
None

- III. Organizational Chart
Included in main overview and complete

- IV. Litigation
None

- V. Licensure/Certification (none required)
ISO 27001 certificate included

- VI. Certificate of Insurance
Included

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

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EVALUATOR NAME: Tim Morton

EVALUATOR DEPARTMENT: Bowdoin College

Poetry & Short Story Reference Source

I – poems, short stories, and related lesson plans, etc

P – low % of embargoed titles

Points of View Reference Source

I – offers multiple sides of current issues

Primary Search

I – elementary school level content database

P – zero embargoed titles

Q – special interface for younger users?

Professional Development Collection

I – designed for educators

N – large % of embargoed titles

Read It!

I – adaptive reading material for MS/HS

Science Reference Source

I – general science/math reference database

N – medium % of embargoed titles

e. Academic Resources

I – 4,317,314 titles/content items

Q – what is content overlap between these various databases?

Academic Search Premier

I – general academic database, smaller than Complete

N – large number of embargoed titles

Associates Programs Source

I – database designed for two-year colleges, smaller than Plus

N – low % of peer-reviewed titles

Business Source Premier

I – covers all business fields, smaller than Complete

N – medium % of peer-reviewed and embargoed titles

Computers & Applied Sciences Complete

I – research database covering STEM, smaller than Source

N – medium % of embargoed titles

Engineering Source

I – engineering database

N – medium % of embargoed and OA titles

Environment Complete

I – environmental studies, sustainability, etc

N – medium % of embargoed and OA titles

Health Source: Nursing – Academic Edition

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EVALUATOR DEPARTMENT: Bowdoin College

P – daily updates

N – 77% of titles inactive

P – zero embargoed titles

Q – claims not to include images, but also includes 2.3M images?
(p.49)

I – 5 ME newspapers

c. Readers Advisory

NoveList Plus

P – can browse by genre plus limiters like lexile range, awards,
author nationality/identity/gender

I – info for 650,000+ books, adds 25,000/yr

I – separate taxonomy from other Ebsco products

NoveList K-8 Plus

P – can browse by genre plus limiters like lexile range, awards,
author nationality/identity/gender

P – simplified interface for younger users

I – information on 175,000 titles

d. Prek-12 Resources

I – 4,882,276 titles/content items

Biography Reference Source

Q – “static” update frequency, but contains active journals (p.61)

I – lengthy explanation of K-12 learning standards, may be generic

I – lengthy explanation of support materials, may be generic

EBSCO eBooks Cricket Media Subscription Collection

I – K-8 ebook collection, spans 1995-2020

ERIC

I – resource for K-12 educators

I – 3rd party licensed resource

History Reference Source

I – covers both US and World History

N – large % of embargoed titles

Literary Reference Plus

I – multiple formats covering multiple genres and eras

N – medium % of embargoed titles

MAS Complete

I/Q – general database, difference from other offered databases?

Middle Search Plus

I – middle school focused database

P – low % of embargoed titles

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Tim Morton

EVALUATOR DEPARTMENT: Bowdoin College

- I – nursing and allied health database
- N – large % of embargoed titles, worrying for health database
- Humanities Source
 - I – interdisciplinary humanities coverage
 - N – medium % of embargoed titles
- f. Small Business Resources
 - I – 2,335,755 titles/content items
 - Accel5 Business Book Summaries & Videos
 - I – book summaries and videos on leadership and business
 - Q – book summaries like CliffsNotes?
 - Q – not included in package summary in first pages?
 - Entrepreneurial Studies Source
 - I – database on entrepreneurship and small business
 - Medium % of embargoed and OA titles
 - Small Business Source
 - I – database aimed at small businesses
 - Q – differences from Entrepreneurial Studies Source?
 - N – low % of peer-reviewed titles
- g. Reference eBooks/ Resources
 - Nothing specifically submitted, integrated throughout other areas
- h. Career, College, & Workforce Building Skills
 - LearningExpress Library Complete
 - I – database for 4th grade and up, 3,350 resources
 - I – life skills, academic skills, test prep, career exploration
 - P – customized interfaces for different audiences
 - I – separate indexing/metadata than other databases
 - Vocational & Career Collection
 - I – database for HS, CC, Vo-Tec
 - N – low % of peer-reviewed titles
- B. Scope of Services – Additional Content Resources
 - EBSCO eBooks Open Access Subscription Collection
 - I – curated OA ebook content, 14,155 titles
 - European Views of the Americas: 1493 to 1750
 - I – European publications about the Americas
 - I – index-only resource
 - Exploring Race in Society
 - I – free research database on race and society
 - I – mix of original essays and existing articles/reports
 - GreenFILE

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Ebsco: Package 2 – The Premier Package

DATE: May 8, 2024

EVALUATOR NAME: Tim Morton

EVALUATOR DEPARTMENT: Bowdoin College

File 3 – Proposed Services and Technical Assessment

I. **Appendix F** – Proposed Content Template

A.1. Scope of Services to be Provided: Content

Common

I – 6,534,752 titles/content items

P – unified indexing/metadata across databases

P – integration with systems, printing, and citation export across databases

P – institutions can suppress A&I-only content

a. General Interest Resources

I – 2,477,594 titles/items

Alt HealthWatch

I – contains complementary and alt-health information

Q – is info reviewed for accuracy/datedness?

P – low % of embargoed titles

Auto Repair Source

N – no video content (p.17)

I – content comparison with other databases included

Consumer Health Complete

I – general health database

P – variety of content

Q – what is overlap with Alt HealthWatch?

N – large % of embargoed titles (p.20)

Q – is info reviewed for accuracy/datedness?

Hobbies & Crafts Source

P – companion reference collection

I – larger amount of multimedia content vs. print (p.26)

Home Improvement Source

P – companion reference collection

I – very large amount of multimedia content vs. print (p.30)

Legal Information Source

Q – how are books provided through Nolo? (p.30)

MasterFILE Complete

I – general database aimed at public libraries

I – medium % of embargoed journals (p.36-37)

Small Engine Repair Source

I – small engine reference database

b. Newspapers

Newspaper Source Plus

I – 1,192 titles

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EVALUATOR NAME: Tim Morton

EVALUATOR DEPARTMENT: Bowdoin College

- I – free database on human impact to the environment
- I – journals and magazines
- Library Information Science & Technology Abstracts (LISTA)
- I – database covering library & information science
- I – index-only resource
- Teacher Reference Center
- I – database specifically for teachers
- I – abstracts/indexing only

II. Appendix G – Response to Proposed Services Form

Part II, Scope of Services to be Provided

A.1. Content

- I – three different package offerings, with one individual database
- P – discounts for libraries that upgrade to higher tiers of subscribed products
- P – credits for libraries that currently subscribe to identical databases
- P – overview of curation practices for database content

A.2. Interface

- P – addressed and supports all requested functionality (A.2.1, A.2.2)
- P – can search multiple EBSCOhost databases simultaneously
- P – extensive printing/downloading/exporting options
- P/N – citation export on EBSCOhost databases, but not all others (A.2.5)
- P – supports multiple LMS and related systems (A.2.6)
- N – no e-reserve integration, relies on manual workflows (A.2.7)
- P/N – EBSCOhost databases have good connectivity with discovery systems, others do not (A.2.8)
- P/N – bookmarking, persistent links, alerts available on 3 of 5 platforms (A.2.9)
- P – libraries can customize authentication for alerts, shared links, etc
- P – custom interface for public/school libraries
- P/N – EBSCOhost and MyHeritage have extensive translations, others don't
- P/N – Text-to-speech on EBSCOhost platform only
- P – platforms are accessible and VPATs have been included

A.3. Authentication

- P – numerous authentication options including geolocation
- P – authentication can apply at database, title, or article level
- P – URL builder to allow librarians to share content with patrons

A.4. Statistics and Reporting

- P – EBSCOhost platform COUNTER data available and SUSHI-compliant
- N – Auto Repair Source and MyHeritage require emails to Ebsco for stats
- N – other platforms have non-COUNTER data
- P – stats available for institutions and statewide with customizable timeframes

**STATE OF MAINE
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EVALUATOR DEPARTMENT: Bowdoin College

P – all stats available as Excel files

A.5. Training and Marketing

N – 6 training sessions per year, additional training is additional cost

P – virtual training available, both live and recorded

P – dedicated training specialist

P – provides digital and physical marketing materials

P – dedicated marketing representative

P – branding options of 4 of 5 platforms

A.6. Discovery, Metadata, Linking, and Branding

P/N – lots of widgets for EBSCOhost platform, more limited elsewhere

P/N – interface customization on EBSCOhost, limited on other platforms

P – branding options of 4 of 5 platforms

P – supports OpenURL standards for platforms where it's relevant

P/N – MARC records only for EBSCOhost and LearningExpress

P/N – Only EBSCOhost platform indexed by Google Scholar

A.7. Support and Service

P – 24/7 tech support, 70% cases resolved same day

P – 99.5% uptime on all platforms

I – links to numerous privacy policies

P – links to roadmaps and intended enhancements

P – quick implementation for current Ebsco customers

B.1. Additional Services

Can offer other services like discovery, authentication, etc

III. Appendix H – Technical Assessment Form

They appear to comply with state IT requirements

VPATs provided for products

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: EBSCO Package #2

DATE: 5/10/2024

EVALUATOR NAME: Tim Pellett

EVALUATOR DEPARTMENT: Maine InfoNet

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

File 1 – Preliminary Information

- I. **Appendix A – Cover Page**
Submitted as required:

- II. **Appendix B – Debarment, Performance, and Non-Collusion Certification Form**
Submitted as required:

File 2 – Organization Qualifications & Experience

- I. **Appendix C – Qualifications & Experience Form**
 - Established over 80 years ago
 - Provided online content since 1995
 - Long term provider for State of Maine
 - Robust experience working with large consortia and all library types
 - Has over 3,000 employees worldwide – what is break down for online services?

- II. Subcontractors
 - Provided – meets RFP requirements

- III. Organizational Chart
 - Provided – meets RFP requirements

- IV. Litigation
 - Provided – meets RFP requirements

- V. Licensure/Certification (none required)
 - Provided – meets RFP requirements

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: EBSCO Package #2

DATE: 5/10/2024

EVALUATOR NAME: Tim Pellett

EVALUATOR DEPARTMENT: Maine InfoNet

- VI. Certificate of Insurance
- Provided – meets RFP requirements.

File 3 – Proposed Services and Technical Assessment

I. **Appendix F** – Proposed Content Template

A.1. Scope of Services to be Provided: Content
Package 2.

a. General Interest Resources

- Same as package 1 and 3.
- Meets RFP requirements

b. Newspapers

- Same as package 1 and 3.
- Meets RFP requirements

c. Readers Advisory

- Same as package 1 and 3.
- Meets RFP requirements

d. Prek-12 Resources

- Same as package 1 and 3.
- Meets RFP requirements

e. Academic Resources

- Includes 6 additional databases listed under academic
- A lot more full-text
- Meets RFP requirements

f. Small Business Resources

- Same as package 1 and 3.
- Meets RFP requirements

g. Reference eBooks/ Resources

- Same as package 1 and 3.
- Meets RFP requirements

h. Career, College, & Workforce Building Skills

- Same as package 1 and 3.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: EBSCO Package #2

DATE: 5/10/2024

EVALUATOR NAME: Tim Pellett

EVALUATOR DEPARTMENT: Maine InfoNet

- meets RFP requirements

B. Scope of Services – Additional Content Resources

- Six additional databases, freely available on internet. Not full-text

II. **Appendix G** – Response to Proposed Services Form

Part II, Scope of Services to be Provided

A.1. Content

- Three database packages. Price based on overall content, additional configuration possible.

- MyHeritage is being offered separately and is optional.

- Discount offered to other Maine libraries if EBSCO receives award

- Will offer credit to libraries with duplicate subscriptions, however they expire 12 months after start date of DML contract.

- Trial info provided

- EBSCO Connect for webinars, tutorials, FAQ, LibGuides etc

- Robust search commands/limiters in advanced search

- Good overview of how they curate content

- Flexibility to customize packages

A.2. Interface

- Explora interface for K-12 audience

- Persistent links

- Integrates with Google and Microsoft products

- Text to speech functionality

- Predictive search, auto-suggest, spell check

- Cross searching, multiple search modes

- Search on Lexile number or age group

- Integrates with LTI products – Brightspace BB, Moodle etc

- EBSCO is a Discovery provider

- EBSCO content integrates with other discovery systems

- Supports OpenURL

- Interface has 31 language translations

- ADA/508 compliant

- Personal accounts (MyEBSCO)

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: EBSCO Package #2

DATE: 5/10/2024

EVALUATOR NAME: Tim Pellett

EVALUATOR DEPARTMENT: Maine InfoNet

A.3. Authentication

- Supports a variety of auth options – IP, EZProxy, OpenAthens
- Geo auth is limited to EBSCO products only
- Cannot provide geo auth system we have now

A.4. Statistics and Reporting

- COUNTER 5 and non-COUNTER usage reports
- Offers SUSHI
- Robust interface and report options and configuration
- Cannot provide library specific usage without an account

A.5. Training and Marketing

- Six customized online training session per year at no cost
- EBSCO Academy for acct admins and library staff training
- Robust support and training info at EBSCO Connect
- Offers digital and print promotional materials including product buttons and logos with URLs, screensavers, media kits. Bookmarks and handouts. Some items customizable, not sure how much though.

A.6. Discovery, Metadata, Linking, and Branding

- Branding color and logo at state level
- Can have parent/child relationship of accounts (already set that way), but for existing paid accounts.
- Can integrate placards, LibChat, LibGuides, Libraryh3lp
- Marc21 records
- Export holdings to GoogleScholar
- Content is not discoverable in search engines.

A.7. Support and Service

- 24/7 support
- Ticketing system with online interface to track support cases
- Robust support system
- 99.9% uptime although they do have occasional component outages
- Status alerts page
- Utilizing AWS with multiple availability zones

B.1. Additional Services

- Duplication of narrative of content mentioned.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

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BIDDER NAME: EBSCO Package #2

DATE: 5/10/2024

EVALUATOR NAME: Tim Pellett

EVALUATOR DEPARTMENT: Maine InfoNet

- III. **Appendix H** – Technical Assessment Form
- See notes from Bill Wheeler, State OIT liaison for this RFP.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: EBSCO

DATE: May 11, 2024

EVALUATOR NAME: William Wheeler

EVALUATOR DEPARTMENT: Maine Office of Information Technology

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

While I participated in the meetings, I left the application evaluation to those that are familiar with the library and knew what they needed in the application. I felt I could add very little to this part of the process. I did evaluate Appendix H and my notes for that are below. There was only one Appendix H for all packages submitted by EBSCO.

File 1 – Preliminary Information

- I. **Appendix A – Cover Page**
Submitted as required: Y/N
Yes

- II. **Appendix B – Debarment, Performance, and Non-Collusion Certification Form**
Submitted as required: Y/N
Yes

File 2 – Organization Qualifications & Experience

- I. **Appendix C – Qualifications & Experience Form**
Provided

- II. Subcontractors
No subcontractors used. Subprocessor list supplied.

- III. Organizational Chart
Provided

- IV. Litigation
No litigation to disclose

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: EBSCO

DATE: May 11, 2024

EVALUATOR NAME: William Wheeler

EVALUATOR DEPARTMENT: Maine Office of Information Technology

V. Licensure/Certification (none required)
 Provided

VI. Certificate of Insurance
 Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: EBSCO

DATE: May 11, 2024

EVALUATOR NAME: William Wheeler

EVALUATOR DEPARTMENT: Maine Office of Information Technology

File 3 – Proposed Services and Technical Assessment

I. **Appendix F** – Proposed Content Template

I am not familiar with the State Library, their needs, or whether what was proposed was sufficient. I left the assessment of these areas to those members that could make a far better determination than myself.

A.1. Scope of Services to be Provided: Content

- a. General Interest Resources
- b. Newspapers
- c. Readers Advisory
- d. Prek-12 Resources
- e. Academic Resources
- f. Small Business Resources
- g. Reference eBooks/ Resources
- h. Career, College, & Workforce Building Skills

B. Scope of Services – Additional Content Resources

II. **Appendix G** – Response to Proposed Services Form

I am not familiar with the State Library, their needs, or whether what was proposed was sufficient. I left the assessment of these areas to those members that could make a far better determination than myself.

Part II, Scope of Services to be Provided

- A.1. Content
- A.2. Interface
- A.3. Authentication
- A.4. Statistics and Reporting
- A.5. Training and Marketing
- A.6. Discovery, Metadata, Linking, and Branding
- A.7. Support and Service
- B.1. Additional Services

III. **Appendix H** – Technical Assessment Form

EBSCO did a very good job of answering all the questions presented in Appendix H. They either provided a direct answer to the question or provided information on which attached document to review for the specific answer.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: EBSCO Package #3

DATE: May 10, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

Instructions: *The purpose of this form is to record proposal review notes written by individual evaluators for this Request for Proposals (RFP) process. It is required that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

File 1 – Preliminary Information

- **Appendix A – Cover Page**
Submitted as required: Y

- **Appendix B – Debarment, Performance, and Non-Collusion Certification Form**
Submitted as required: Y

File 2 – Organization Qualifications & Experience

- I. **Appendix C – Qualifications & Experience Form**
 - Impressive 80 years in existence and providing online resources since 1995
 - Mentions serving public, academic, K12 and special libraries
 - Major company with over 3,000 employees
 - Include 3 similar clients—KY, CT, RI
 - Long term provider in Maine, both DML and individual libraries

- II. Subcontractors
No subcontractors will be used for this contract but do use subprocessors.

- III. Organizational Chart
Robust, logical, detailed

- IV. Litigation
Statement of no litigation

- V. Licensure/Certification (none required)
ISO 27001 security framework compliance document provided

- VI. Certificate of Insurance

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: EBSCO Package #3

DATE: May 10, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

Submitted as required, appears adequate

File 3 – Proposed Services and Technical Assessment

I. **Appendix F** – Proposed Content Template

A.1. Scope of Services to be Provided: Content

- Direct linking between products is a plus
- Enhanced LTI integration with school LMS and authentication systems
- Includes open source content, but only charges for paid content
- Libraries can exclude A&I titles to make fully full text content
- majority of most important periodicals have no embargo period
- offers cumulative coverage of indexing, abstracts and full text, including extensive backfiles
- offers integration with LTI v.1.3 compliant systems, including common LMS, as well as share-to Google Classroom options, and single sign-in with Google or Clever SSO
- handy citation tool, and exports to other citation tools
- K12 ties are helpfully mentioned in resources not in the preK-12 category
- Proposal is well organized, easy to navigate

a. General Interest Resources

Meets requirements of RFP

Well rounded selection of topics

- Alt HealthWatch
 - complementary, holistic and integrated approaches to health care and wellness
 - journals and magazines
- Auto Repair Source
 - Content is processed by automotive experts at MOTOR and comes from the Original Equipment Manufacturers. Is a division of Hearst Business Media
 - Designed for touch-enabled devices
 - Updated quarterly
 - No videos, a drawback
- Consumer Health Compete

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EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

- Comprehensive consumer health resource
- Journals, magazines, trade publications, audio, video, reports, diagrams, comes with a companion eBook collection
- Updated weekly

- Hobbies & Crafts Source
 - full-text hobby and craft magazines, journals, hobby profiles, recipes and videos. comes with a companion eBook collection

- Home Improvement Source
 - Academic journals, magazines, trade publications, images. comes with a companion eBook collection
 - Updated weekly
 - Does not include videos

- Legal Information Source
 - full text legal reference works, journals, trade publications, magazines and legal forms for consumers and small businesses
 - updated weekly

- MasterFILE Complete
 - full-text magazines, journals, images, reference books, 75,000 videos from AP, primary sources for the general public. comes with a companion eBook collection
 - updated daily

- Small Engine Repair Source
 - User friendly repair and maintenance guides for all types of small engines
 - Full text reference books with photos and illustrations
 - Updated monthly
 - No multimedia content

- b. Newspapers
Meets RFP requirements
 - Newspaper Source Plus
 - full-text collection of the world's major news content—500+ titles of newspapers and newswires, tv and radio transcripts and ongoing daily updates from popular news sources

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

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EVALUATOR DEPARTMENT: Maine State Library

- LTI integration with automatic role provisioning. Fully integrated with Google Classroom, Canvas, Blackboard, Moodle, Desire2Learn and Schoology LMS platforms
- Does it allow simultaneous usage of eBooks?

- Biography Reference Source
 - Thousands of unique biographies. Comes with a companion eBook collection
 - Primary and secondary schools

- EBSCO eBooks Cricket Media Collection
 - eBook collection for preK-8
 - digital access to short-form fiction and nonfiction titles by Cricket Media
 - full text, from 1995
 - updated quarterly
 - specifies alignment with MLR, a plus

- ERIC
 - A licensed index. Indexed and links to full-text education literature and resources, sponsored by the US Department of Education

- History Reference Source
 - Covers all time periods and aspects of global history
 - Primary and secondary schools
 - Journals, magazines, biographies, primary source docs. Comes with a companion eBook collection
 - Updated weekly

- Literary Reference Plus
 - collection of reference works across all genres and time periods. It contains thousands of poems, short stories, classic novels, plot summaries, critical analysis essays, literary journals, reference books and author biographies, plus lesson plans and literary study guides. Comes with a companion eBook collection
 - Primary and secondary schools
 - Updated daily

- MAS Complete
 - Designed for high school libraries.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

- update up to 4 times daily
- 16 years average length of back files
- No video content but tv and audio news transcripts are included
- Includes Maine titles: KJ, Bangor Daily News, Morning Sentinel (Waterville), Portland Press Herald, Sun Journal (Lewiston)
- Updates daily but does not specify which publications this includes

c. Readers Advisory

Exceeds RFP requirements

- NoveList Plus and K-8 Plus
 - Leading industry readers advisory tool
 - Covers all genres of fiction and nonfiction, includes samples of audiobooks for previewing
 - Many user friendly ways to browse, including a “Make Your Own Appeal Mix” tool
 - Includes 4 age brackets (Adult, Teen, Ages 9-12 and Ages 0-8)
 - Includes “on the shelf” feature to see if titles are available at your local library
 - Updated weekly, adds 25K new titles each year
 - Created by librarians, for librarians. 25 librarians on staff—a major plus
 - Going on for 30 years
 - Can search by Lexile and AR levels
 - Points out that this aids parents, teachers, librarians, and students directly
 - Product has its own taxonomy, indexing and controlled vocabularies developed in house for user friendliness
 - Robust educational support materials

d. Prek-12 Resources

Exceeds RFP requirements

- Comprehensive
- Aligns with Common Core standards. Mentions that Maine standards align with Common Core but nothing more specific.
- EBSCO Connect support site provides resources for teachers, educators, administrators, librarians—lesson plans, templates, rubrics, scavenger hunts, training, promo materials, list of funding sources, info literacy etc. Also provides support for students—research, writing, info literacy, etc.

**STATE OF MAINE
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EVALUATOR DEPARTMENT: Maine State Library

- full text of hundreds of popular magazines and e-books covering a range of topics. Also full-text primary source documents and videos from AP. Comes with a companion eBook collection
- focus on current events/news

- Middle Search Plus
 - Designed for middle school libraries
 - popular middle school magazines and thousands of primary source documents and videos. Comes with a companion eBook collection
 - focus on current events/news, popular kids' topics

- Poetry & Short Story Reference Source
 - full-text of poems, short stories, biographies, essays, lesson plans and learning guides. It also includes high-quality videos and audio recordings from the Academy of American Poets. Comes with a companion eBook collection
 - primary and secondary school libraries

- Points of View Reference Source
 - Provides resources presenting different views of current topics from magazines and point of view essays
 - Primary and secondary school libraries
 - each topic includes a Guide to Critical Analysis

- Primary Search
 - Elementary school libraries
 - full text for popular children's magazines and encyclopedic entries written specifically for kids. Comes with a companion eBook collection
 - covers a range of popular kids' topics and school subjects

- Professional Development Collection
 - full-text resources for educators, professional librarians and education researchers
 - journals, magazines, trade publications, reports. Comes with a companion eBook collection

- Read It!

**STATE OF MAINE
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EVALUATOR DEPARTMENT: Maine State Library

- For middle and high school students needing adapted reading materials for school subjects. Has resources to help build background knowledge, conduct research and improve study skills
- This is a very useful and unique resource

- Science Reference Source
 - full text science magazines, journals, and high-quality videos. Also contains science experiments, curriculum-aligned lesson plans, and an image collection. Comes with a companion eBook collection
 - Primary and secondary school libraries

- e. Academic Resources
Package 3 meet RFP requirements
 - Academic Search Elite
 - Comprehensive academic database
 - Updated daily
 - 2,249 full text journals, 78% peer-reviewed

 - Applied Science & Technology Source Full Text
 - Full text, foundational research database covering all STEM fields
 - Updated daily

 - Associates Programs Source
 - designed specifically for the research needs of two-year college students
 - hundreds of full-text journals covering the most relevant subjects for associates programs.
 - Updated daily
 - Unique, useful, relevant resource

 - Business Source Elite
 - full-text coverage of top business, management and economics journals and periodicals

 - Environment Complete
 - Comprehensive full text scholarly database for environmental studies.

 - Health Source: Nursing-Academic Ed.

**STATE OF MAINE
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EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

- Comprehensive full text scholarly database for nursing and allied health
- Humanities Full Text
 - Provides full text, abstracts and bibliographic indexing of humanities journals and magazines
- f. Small Business Resources
 - Together, these resources clearly meet the RFP requirements
 - Accel5 Business Book Summaries & Videos
 - Book summaries and expert videos cover industry topics focusing on soft skills
 - best practices from leading industry experts
 - updated weekly
 - provided in multiple formats
 - a unique and useful resource for small businesses owners
 - Entrepreneurial Studies Source
 - Comprehensive resources for business owners
 - Academic journals, magazines, trade publications, company profiles, eBooks, industry reports, market research reports, SWOT analyses, videos
 - Small Business Source
 - includes business videos, case studies, help and advice, a start-up kit, market research reports, tips for writing business plans, more. Comes with a companion eBook collection
- g. Reference eBooks/ Resources
 - No separate package, but many of the resources come with companion eBooks. 21,000+ eBooks
- h. Career, College, & Workforce Building Skills
 - Exceeds RFP requirements
 - Learning Express Library Complete
 - Very comprehensive e-learning suite for building practical, academic and career skills

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

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DATE: May 10, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

- resources for 4th grade through adults
 - Academic and educational skill-building
 - Career exploration and job search
 - Standardized and occupational test preparation
 - Job and internship postings
 - Excellent, all encompassing learning tool for most ages and needs
 - Can take several months for test prep materials to update
- Vocational & Career Collection
 - full-text coverage for trade and industry-related periodicals for high schools, community colleges, trade institutions and the general public

B. Scope of Services – Additional Content Resources

All freely available

Many are indexed without full text

Having them included will raise awareness of the resources

- EBSCO eBooks Open Access Collection
 - Open Access content curated by the EBSCO collection development team
 - Many subjects covered
- European Views of the Americas
 - free archive of indexed publications related to the Americas and written in Europe before 1750
 - thousands of primary source docs
- Exploring Race in Society
 - Free research database covering race and EDI issues
 - General public, academic and high school audiences
- GreenFILE
 - free research database covering all aspects of human impact to the environment
 - general public interest
- LISTA
 - Free research database for LIS topics

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: EBSCO Package #3

DATE: May 10, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

- provides indexing and abstracting for hundreds of key journals, books and research reports
- Teacher Reference Center
 - Complimentary database providing indexing and abstracts for more than 230 peer-reviewed ed journals

II. **Appendix G** – Response to Proposed Services Form

Part II, Scope of Services to be Provided

For EBSCO-provided 3rd party resources, many options are more limited.

A.1. Content

- Libraries in ME would get discounts on EBSCO products they purchase separately—a plus
- Libraries would get prorated credits on current subscriptions they have to products included in package, to be used in 12 months—somewhat limiting
- Providing 3 package options, plus the opportunity to custom design a package—a big plus
- High curation standards, well considered, strong inclusion of on the ground experts

A.2. Interface

- EBSCOHost interface
- Explora interface: designed for school and public library usage
- Both will search all databases included in the library profile, with de-duped results, sorted by relevance
- Moving to a new interface in July 2025
- Robust search capabilities
- supports Google Classroom and MS OneDrive integration
- compatible with Canvas, Blackboard, Moodle, Desire2Learn (Brightspace) and Schoology LMS
- does not currently integrate electronic course reserve systems into main interfaces but might in the future
- bookmarking is very easy
- main interface can be translated into 31 languages
- main interface has text to speech capability
- interfaces designed to be ADA compliant. Strive to comply with WCAG standards

STATE OF MAINE INDIVIDUAL EVALUATION NOTES

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DATE: May 10, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

- sounds like the new interface will not have any one to one help options—a big negative

A.3. Authentication

- provides geoauth only for their products, very limiting

A.4. Statistics and Reporting

- Robust array of reports available including COUNTER
- Stats available at the individual library and consortia levels. They can be broken down by institution, library type and more
- COUNTER 5 and SUSHI compliant

A.5. Training and Marketing

- Only 6 customized online trainings per year included—very limited. In person training available for an additional fee
- Have 40 trainers on staff
- Dedicated training rep and marketing rep for Maine
- Provide free online synchronous trainings regularly, not customized
- Will provide a customized training plan for DML
- Many synchronous online training materials are available for no extra cost
- Marketing materials available, some customizable
- Limited branding options will be available in the new interface

A.6. Discovery, Metadata, Linking, and Branding

- Branding options with logos for individual libraries
- Options to integrate with Springshare products
- Support Open URL
- Provide MARC records

A.7. Support and Service

- Tech support available 24/7 by phone and online
- In 2023, 99.9% uptime. Guaranteed uptime of EBSCOHost and Explora 99.9%
- Provide privacy policy statements for the products
- Many products certified compliant with the ISO 27001 security framework

B.1. Additional Services

Rehashing of previously mentioned services

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: EBSCO Package #3

DATE: May 10, 2024

EVALUATOR NAME: Beth Crist

EVALUATOR DEPARTMENT: Maine State Library

III. **Appendix H** – Technical Assessment Form
Complete answers

Package 1: missing academic business resource. 3 sections exceed requirements, 5 met

Package 2:

Package 3: 5 of 8 exceed requirements

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Ebsco - Package 3

DATE: May 9, 2024

EVALUATOR NAME: Heidi Cook

EVALUATOR DEPARTMENT: RSU5/Freeport High School

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

File 1 – Preliminary Information

- I. **Appendix A – Cover Page**
Submitted as required: Y/N
Yes
- II. **Appendix B – Debarment, Performance, and Non-Collusion Certification Form**
Submitted as required: Y/N
Yes

File 2 – Organization Qualifications & Experience

- I. **Appendix C – Qualifications & Experience Form**
Extensive experience in print and electronic
- II. Subcontractors
None used for this contract. subprocessors support business operations
- III. Organizational Chart
Provided with supporting info about key players
- IV. Litigation
No litigation
- V. Licensure/Certification (none required)
provided
- VI. Certificate of Insurance
provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Ebsco - Package 3

DATE: May 9, 2024

EVALUATOR NAME: Heidi Cook

EVALUATOR DEPARTMENT: RSU5/Freeport High School

A.3. Authentication

- Robust and varied. Meets all RFP requirements

A.4. Statistics and Reporting

A.5. Training and Marketing

- 6 custom sessions annually
- no in-person training included

A.6. Discovery, Metadata, Linking, and Branding

- High level of customization & branding available for most products
- EBSCO Experience Manager (EEM) available at site level to consortium members. Would this apply to sites in Maine using DML?

A.7. Support and Service

- 24/7 customer support (P)
- EBSCO Connect support site for customers/users is robust. (P)
- EBSCO Academy for in-depth training (P)

B.1. Additional Services

III. **Appendix H** – Technical Assessment Form

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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BIDDER NAME: Ebsco - Package 3

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EVALUATOR DEPARTMENT: RSU5/Freeport High School

File 3 – Proposed Services and Technical Assessment

I. **Appendix F** – Proposed Content Template

A.1. Scope of Services to be Provided: Content

- overview: “strict vetting processes in place to minimize the inclusion of predatory content in our open access and paid offerings” (P)
- excellent chart showing “overview of the full-text types and quantities available” (P)
- updating ranges from multiple times a day to annually depending on resource (P)
- References specific aspects of nonK-12 resources which address Maine Learning Results (P)
- Many databases have extensive eBook collections: publication dates appear to be appropriate for collection (e.g. Health collections are mostly last couple of years, craft & homeowner collections have a larger span going back ~10 years) (P)
- EBSCO taxonomy (300,000+ topical terms)
- Explanation of how new concepts are added and term assigned (P)
- Integration with digital learning environments, including Google Classroom (P)
- Citation integration robust: 9 standard formats which export to major citation tools (including RIS format) (P)
- Additional resources include *European Views of the Americas: 1493-1750*
- *Exploring Race in Society* database also included
- *Teacher Reference Center* (P)

a. General Interest Resources

- Magazines include *The New Yorker*, *Atlantic Monthly*, *New York Review of Books* (P)
- Consumer Health eBooks: 2019 -2023 (P)
- Nolo Press is major source for Legal Info resource (P)

b. Newspapers

- Includes *New York Times* (P)
- Includes 5 major Maine newspapers: PPH, BD,MS, KJ, SJ (P)
- Confusing: “Newspaper Source Plus does not include any images or video content” then “Newspaper Source Plus also includes 2,307,943 images” Did first sentence here mean to say “audio” rather than images?” (Q)

**STATE OF MAINE
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EVALUATOR DEPARTMENT: RSU5/Freeport High School

c. Readers Advisory

- 17k audiobook samples (P)
- 25+ librarians on staff (P)
- Readers Advisory of choice with proven track record (P)
- Librarians across Maine already use and rely on this resource. (P)
- Deep categories which allow users to find materials by wide range of descriptors. Users do not have to depend on algorithm (P)

d. Prek-12 Resources

Exceeds

- Would like to know more about Explora interface, the student-friendly search interface for EBSCO products (e.g. grade level adjustable? customizable at state and/or site levels? Does this include all resources or only K-12 designated ones?) (Q)
- Includes K-8 eBook collection: Cricket Media (950 eBooks)
- “This integration works with any LTI v1.3 compliant product. Currently, EBSCO’s LTI tool has been fully integrated, tested and confirmed compatible with Canvas, Blackboard, Moodle, Desire2Learn and Schoology LMS platforms. LTI integration may also be possible with other v1.3 compliant LMSs, if the administrator knows how to configure the proper URLs within the LMS and EBSCO’s administrative module, based on the LTI v1.3 specification. Other LMSs will continue to be evaluated for integration.” (P)
- Google for Education Partner status (P)
- Literary Reference Plus includes full text of many classic works (P)
- *Points of View* database excellent for supporting high school students researching current events and controversial topics. (P)
- Read it! for emerging readers and has ELL specific resources at three levels. Useful for New Mainers. (P)
- Science Reference include experiments. Are these 3D?

e. Academic Resources

Meets

- Academic Search Elite would be useful for secondary school students. (P)
- Poetry & Short Story Reference Source includes many classic & contemporary literary works in addition to literary criticism and supporting information.

f. Small Business Resources

Exceeds

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: RSU5/Freeport High School

g. Reference eBooks/ Resources

- Covered extensively throughout proposal (P)

h. Career, College, & Workforce Building Skills

- Exceeds
- Resources in Learning Express are extensive and up-to-date (P)
- Resources in Learning Express are for nearly all ages and stages (P)

B. Scope of Services – Additional Content Resources

II. **Appendix G** – Response to Proposed Services Form

Part II, Scope of Services to be Provided

A.1. Content

- Discussion of discounts available to libraries who already subscribe to EBSCO databases: credit for any duplicate resources would be given allowing for additional resources or upgrades to be used within 12 months (P)
- Willingness to adjust packages further (P)
- “EBSCO research databases have built-in controls that allow each school or library to make content inclusion decisions independently—above and beyond the level of curation done by EBSCO.”
- Majority of subject matter experts have Master’s degrees aligning with database subject line (P)
- Trials available!

A.2. Interface

- EBSCOHost (flagship) & Explora (public library, primary school & secondary school editions).
- Users can create projects, save searches & track liked items “My Dashboard” (P)
- PDFs are actual article PDFs in many cases (P)
- There are some articles that are HTML text download only. “[Lost Roman Resort](#)” in Archaeology (*History Reference Source*) references 10 color photos and a map, none of which are included. (N)
- Extensive pre and post search limiters. (P)
- When switching from basic to advanced search, terms and limiters selected in basic carry over to advanced. (P)
- “SmartText search” coming soon. Seems like this will support less experienced searchers in carrying out complex searches (I and P)
- Saved searches and items are in “My dashboard” If logged in with individual acct, this persists, if not, only available during a particular search session. (P)
- Bookmarking is very easy for records and searches (P)

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: EBSCO Package 3 — The Elite Package

DATE: May 10, 2024

EVALUATOR NAME: Jenna Davis

EVALUATOR DEPARTMENT: Maine State Library

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department’s RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

File 1 – Preliminary Information

- I. **Appendix A – Cover Page**
Submitted as required: *Yes*

- II. **Appendix B – Debarment, Performance, and Non-Collusion Certification Form**
Submitted as required: *Yes*

File 2 – Organization Qualifications & Experience

- I. **Appendix C – Qualifications & Experience Form**
Extensive history, very experienced vendor. Has done ample work with a wide variety of library types. Provided project summaries.

- II. Subcontractors
Vendor states that subcontractors “...will not be engaged in relation to this contract proposal”.

- III. Organizational Chart
Team-based with key personnel. Contact information provided.

- IV. Litigation
None.

- V. Licensure/Certification (none required)
ISO 27001.

- VI. Certificate of Insurance
Included evidence of coverage.

**STATE OF MAINE
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DATE: May 10, 2024

EVALUATOR NAME: Jenna Davis

EVALUATOR DEPARTMENT: Maine State Library

File 3 – Proposed Services and Technical Assessment

I. **Appendix F** – Proposed Content Template

A.1. Scope of Services to be Provided: Content

a. General Interest Resources

Range of interests are covered: legal, health, automotive, etc. Variety of audience levels covered. Note Auto Repair Source does not include video. Several sources come with companion Reference eBook Collection.

b. Newspapers

Includes Newspaper Source Plus. Over 500 titles. Includes Kennebec Journal, Portland Press Herald, Bangor Daily News, Sun Journal.

c. Readers Advisory

Novelist K-8 Plus and Novelist Plus. Targeted search based on appeal list. Recommended read lists include recommended grade levels. “May” support Maine Learning Results, which are linked.

d. Prek-12 Resources

Variety of topics. ERIC interface, ReadIt! (includes adapted reading material), science (experiments), biographies, etc. Covers range of age groups. Vendor states they offer integration with LTI v.1.3 compliant systems, including common LMS, as well as share-to Google Classroom options, and single sign-in with Google or Clever SSO.

e. Academic Resources

Vendor states they “...offer fully formatted citations, as well as Export options for working with popular citation tools, such as EasyBib, RefWords, EndNote, Noodle Tools and other tools that support RIS formats.” Humanities Source. Note that package three (elite) offers Academic Search Elite.

f. Small Business Resources

Entrepreneurial Studies Source is listed as being research focused with industry reports, market research, etc. Small Business Source contains business launch and growth tools; marketing, writing a business plan, etc. Good to see side-by-side.

g. Reference eBooks/ Resources

Variety listed in different areas. Include Poetry & Short Story Reference Source, Science Reference Source, associated ebooks.

h. Career, College, & Workforce Building Skills

Learning Express Library Complete, Vocational & Career Collection. Note that Learning Express includes PrepSTEP and Job & Career Accelerator modules. Variety of exam prep options including ACT, GRE, LSAT, MCAT, etc.

B. Scope of Services – Additional Content Resources

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR DEPARTMENT: Maine State Library

EBSCO eBooks Open Access Collection (interface), European Views of the Americas, Exploring Race in Society, GreenFILE, LISTA, Teacher Reference Center

MyHeritage (genealogical information) listed as optional add-on.

II. Appendix G – Response to Proposed Services Form

Part II, Scope of Services to be Provided

A.1. Content

Vendor states in General Interest Resources section (Appendix F) that “... When titles are removed from a database, EBSCO seeks replacement content of a similar or higher relative value. As such, there are no price adjustments for regular content additions or removals, and EBSCO will continue to add content monthly.”

Offer to integrate current MyHeritage subscription.

Vendor states that “...should the MSL choose to partner with EBSCO, libraries throughout the state would be eligible for discounts when subscribing to additional EBSCO databases and database upgrades.”

Customizable.

A.2. Interface

Basic and modified/advanced search features. Language support, accessibility functions are detailed. Many examples. Can create alerts via email. No RSS. Can create persistent links. Vendor provides examples of commitment to “continuous improvement of our accessibility...”

A.3. Authentication

Supports a variety of required methods. Geolocation, IP (EZ Proxy, via OIT), SSO, shared authentication, etc.

A.4. Statistics and Reporting

COUNTER Reports, Top Search Terms Reports and Statistical Analytics Reports. Variety of options, including consortia-specific data. Download format may vary.

A.5. Training and Marketing

Detailed training plan and dedicated staff member via vendor.

A.6. Discovery, Metadata, Linking, and Branding

Provides free marketing materials, printables, digital elements, etc. Plug and play options, integration with Libguides, chat, etc. MARC.

A.7. Support and Service

Comprehensive support; 24/7.

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EVALUATOR DEPARTMENT: Maine State Library

B.1. Additional Services

Summary.

III. **Appendix H** – Technical Assessment Form

Review by Bill Wheeler. Notes IT contract area edited within file 3.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Ebsco: Package 3 – The Elite Package

DATE: May 8, 2024

EVALUATOR NAME: Tim Morton

EVALUATOR DEPARTMENT: Bowdoin College

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department’s RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

File 1 – Preliminary Information

- I. **Appendix A – Cover Page**
Submitted as required: Y

- II. **Appendix B – Debarment, Performance, and Non-Collusion Certification Form**
Submitted as required: Y

File 2 – Organization Qualifications & Experience

- I. **Appendix C – Qualifications & Experience Form**
P – online resources since 1995
P – numerous statewide contracts including KY, RI, CT

- II. Subcontractors
None

- III. Organizational Chart
Included in main overview and complete

- IV. Litigation
None

- V. Licensure/Certification (none required)
ISO 27001 certificate included

- VI. Certificate of Insurance
Included

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

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EVALUATOR NAME: Tim Morton

EVALUATOR DEPARTMENT: Bowdoin College

File 3 – Proposed Services and Technical Assessment

I. **Appendix F** – Proposed Content Template

A.1. Scope of Services to be Provided: Content

Common

I – 6,518,620 titles/content items

P – unified indexing/metadata across databases

P – integration with systems, printing, and citation export across databases

P – institutions can suppress A&I-only content

a. General Interest Resources

I – 2,477,594 titles/items

Alt HealthWatch

I – contains complementary and alt-health information

Q – is info reviewed for accuracy/datedness?

P – low % of embargoed titles

Auto Repair Source

N – no video content (p.17)

I – content comparison with other databases included

Consumer Health Complete

I – general health database

P – variety of content

Q – what is overlap with Alt HealthWatch?

N – large % of embargoed titles (p.20)

Q – is info reviewed for accuracy/datedness?

Hobbies & Crafts Source

P – companion reference collection

I – larger amount of multimedia content vs. print (p.26)

Home Improvement Source

P – companion reference collection

I – very large amount of multimedia content vs. print (p.30)

Legal Information Source

Q – how are books provided through Nolo? (p.30)

MasterFILE Complete

I – general database aimed at public libraries

I – medium % of embargoed journals (p.36-37)

Small Engine Repair Source

I – small engine reference database

b. Newspapers

Newspaper Source Plus

I – 1,192 titles

**STATE OF MAINE
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P – daily updates

N – 77% of titles inactive

P – zero embargoed titles

Q – claims not to include images, but also includes 2.3M images?
(p.49)

I – 5 ME newspapers

c. Readers Advisory

NoveList Plus

P – can browse by genre plus limiters like lexile range, awards,
author nationality/identity/gender

I – info for 650,000+ books, adds 25,000/yr

I – separate taxonomy from other Ebsco products

NoveList K-8 Plus

P – can browse by genre plus limiters like lexile range, awards,
author nationality/identity/gender

P – simplified interface for younger users

I – information on 175,000 titles

d. Prek-12 Resources

I – 4,882,276 titles/content items

Biography Reference Source

Q – “static” update frequency, but contains active journals (p.61)

I – lengthy explanation of K-12 learning standards, may be generic

I – lengthy explanation of support materials, may be generic

EBSCO eBooks Cricket Media Subscription Collection

I – K-8 ebook collection, spans 1995-2020

ERIC

I – resource for K-12 educators

I – 3rd party licensed resource

History Reference Source

I – covers both US and World History

N – large % of embargoed titles

Literary Reference Plus

I – multiple formats covering multiple genres and eras

N – medium % of embargoed titles

MAS Complete

I/Q – general database, difference from other offered databases?

Middle Search Plus

I – middle school focused database

P – low % of embargoed titles

**STATE OF MAINE
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Poetry & Short Story Reference Source

I – poems, short stories, and related lesson plans, etc

P – low % of embargoed titles

Points of View Reference Source

I – offers multiple sides of current issues

Primary Search

I – elementary school level content database

P – zero embargoed titles

Q – special interface for younger users?

Professional Development Collection

I – designed for educators

N – large % of embargoed titles

Read It!

I – adaptive reading material for MS/HS

Science Reference Source

I – general science/math reference database

N – medium % of embargoed titles

e. Academic Resources

I – 4,287,543 titles/content items

Q – what is content overlap between these various databases?

Academic Search Elite

I – general academic database, smaller than Premier

N – large % of embargoed titles

Applied Science & Technology Full Text

I – research database covering STEM, smaller than Source

N – medium % of embargoed titles

Associates Programs Source

I – database designed for two-year colleges, smaller than Plus

N – low % of peer-reviewed titles

Business Source Elite

I – covers all business fields, smaller than Premier

N – medium % of peer-reviewed and embargoed titles

Environment Complete

I – environmental studies, sustainability, etc

N – medium % of embargoed and OA titles

Health Source: Nursing – Academic Edition

I – nursing and allied health database

N – large % of embargoed titles, worrying for health database

Humanities Full Text

**STATE OF MAINE
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EVALUATOR DEPARTMENT: Bowdoin College

- I – interdisciplinary humanities coverage, smaller than Source
- f. Small Business Resources
 - I – 2,335,755 titles/content items
 - Accel5 Business Book Summaries & Videos
 - I – book summaries and videos on leadership and business
 - Q – book summaries like CliffsNotes?
 - Q – not included in package summary in first pages?
 - Entrepreneurial Studies Source
 - I – database on entrepreneurship and small business
 - Medium % of embargoed and OA titles
 - Small Business Source
 - I – database aimed at small businesses
 - Q – differences from Entrepreneurial Studies Source?
 - N – low % of peer-reviewed titles
- g. Reference eBooks/ Resources
 - Nothing specifically submitted, integrated throughout other areas
- h. Career, College, & Workforce Building Skills
 - LearningExpress Library Complete
 - I – database for 4th grade and up, 3,350 resources
 - I – life skills, academic skills, test prep, career exploration
 - P – customized interfaces for different audiences
 - I – separate indexing/metadata than other databases
 - Vocational & Career Collection
 - I – database for HS, CC, Vo-Tec
 - N – low % of peer-reviewed titles
- B. Scope of Services – Additional Content Resources
 - EBSCO eBooks Open Access Subscription Collection
 - I – curated OA ebook content, 14,155 titles
 - European Views of the Americas: 1493 to 1750
 - I – European publications about the Americas
 - I – index-only resource
 - Exploring Race in Society
 - I – free research database on race and society
 - I – mix of original essays and existing articles/reports
 - GreenFILE
 - I – free database on human impact to the environment
 - I – journals and magazines
 - Library Information Science & Technology Abstracts (LISTA)
 - I – database covering library & information science

**STATE OF MAINE
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I – index-only resource

Teacher Reference Center

I – database specifically for teachers

I – abstracts/indexing only

II. Appendix G – Response to Proposed Services Form

Part II, Scope of Services to be Provided

A.1. Content

I – three different package offerings, with one individual database

P – discounts for libraries that upgrade to higher tiers of subscribed products

P – credits for libraries that currently subscribe to identical databases

P – overview of curation practices for database content

A.2. Interface

P – addressed and supports all requested functionality (A.2.1, A.2.2)

P – can search multiple EBSCOhost databases simultaneously

P – extensive printing/downloading/exporting options

P/N – citation export on EBSCOhost databases, but not all others (A.2.5)

P – supports multiple LMS and related systems (A.2.6)

N – no e-reserve integration, relies on manual workflows (A.2.7)

P/N – EBSCOhost databases have good connectivity with discovery systems, others do not (A.2.8)

P/N – bookmarking, persistent links, alerts available on 3 of 5 platforms (A.2.9)

P – libraries can customize authentication for alerts, shared links, etc

P – custom interface for public/school libraries

P/N – EBSCOhost and MyHeritage have extensive translations, others don't

P/N – Text-to-speech on EBSCOhost platform only

P – platforms are accessible and VPATs have been included

A.3. Authentication

P – numerous authentication options including geolocation

P – authentication can apply at database, title, or article level

P – URL builder to allow librarians to share content with patrons

A.4. Statistics and Reporting

P – EBSCOhost platform COUNTER data available and SUSHI-compliant

N – Auto Repair Source and MyHeritage require emails to Ebsco for stats

N – other platforms have non-COUNTER data

P – stats available for institutions and statewide with customizable timeframes

P – all stats available as Excel files

A.5. Training and Marketing

N – 6 training sessions per year, additional training is additional cost

P – virtual training available, both live and recorded

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: Ebsco: Package 3 – The Elite Package

DATE: May 8, 2024

EVALUATOR NAME: Tim Morton

EVALUATOR DEPARTMENT: Bowdoin College

P – dedicated training specialist

P – provides digital and physical marketing materials

P – dedicated marketing representative

P – branding options of 4 of 5 platforms

A.6. Discovery, Metadata, Linking, and Branding

P/N – lots of widgets for EBSCOhost platform, more limited elsewhere

P/N – interface customization on EBSCOhost, limited on other platforms

P – branding options of 4 of 5 platforms

P – supports OpenURL standards for platforms where it's relevant

P/N – MARC records only for EBSCOhost and LearningExpress

P/N – Only EBSCOhost platform indexed by Google Scholar

A.7. Support and Service

P – 24/7 tech support, 70% cases resolved same day

P – 99.5% uptime on all platforms

I – links to numerous privacy policies

P – links to roadmaps and intended enhancements

P – quick implementation for current Ebsco customers

B.1. Additional Services

Can offer other services like discovery, authentication, etc

III. Appendix H – Technical Assessment Form

They appear to comply with state IT requirements

VPATs provided for products

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: EBSCO Package #3

DATE: 5/10/2024

EVALUATOR NAME: Tim Pellett

EVALUATOR DEPARTMENT: Maine InfoNet

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

File 1 – Preliminary Information

- I. **Appendix A – Cover Page**
Submitted as required:

- II. **Appendix B – Debarment, Performance, and Non-Collusion Certification Form**
Submitted as required:

File 2 – Organization Qualifications & Experience

- I. **Appendix C – Qualifications & Experience Form**
 - Established over 80 years ago
 - Provided online content since 1995
 - Long term provider for State of Maine
 - Robust experience working with large consortia and all library types
 - Has over 3,000 employees worldwide – what is break down for online services?

- II. Subcontractors
 - Provided – meets RFP requirements

- III. Organizational Chart
 - Provided – meets RFP requirements

- IV. Litigation
 - Provided – meets RFP requirements

- V. Licensure/Certification (none required)
 - Provided – meets RFP requirements

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: EBSCO Package #3

DATE: 5/10/2024

EVALUATOR NAME: Tim Pellett

EVALUATOR DEPARTMENT: Maine InfoNet

- VI. Certificate of Insurance
- Provided – meets RFP requirements.

File 3 – Proposed Services and Technical Assessment

I. **Appendix F** – Proposed Content Template

A.1. Scope of Services to be Provided: Content
Package 3.

a. General Interest Resources

- Same as package 1 and 2.
- Meets RFP requirements

b. Newspapers

- Same as package 1 and 2.
- Meets RFP requirements

c. Readers Advisory

- Same as package 1 and 2.
- Meets RFP requirements

d. Prek-12 Resources

- Same as package 1 and 2.
- Meets RFP requirements

e. Academic Resources

- Much less content here - primary difference between packages
- Meets RFP requirements

f. Small Business Resources

- Same as package 1 and 2.
- Meets RFP requirements

g. Reference eBooks/ Resources

- Same as package 1 and 2.
- Meets RFP requirements

h. Career, College, & Workforce Building Skills

- Same as package 1 and 2.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: EBSCO Package #3

DATE: 5/10/2024

EVALUATOR NAME: Tim Pellett

EVALUATOR DEPARTMENT: Maine InfoNet

- meets RFP requirements

B. Scope of Services – Additional Content Resources

- Six additional databases, freely available on internet. Not full-text

II. **Appendix G** – Response to Proposed Services Form

Part II, Scope of Services to be Provided

A.1. Content

- Three database packages. Price based on overall content, additional configuration possible.

- MyHeritage is being offered separately and is optional.

- Discount offered to other Maine libraries if EBSCO receives award

- Will offer credit to libraries with duplicate subscriptions, however they expire 12 months after start date of DML contract.

-Trial info provided

-EBSCO Connect for webinars, tutorials, FAQ, LibGuides etc

-Robust search commands/limiters in advanced search

- Good overview of how they curate content

- Flexibility to customize packages

A.2. Interface

- Explora interface for K-12 audience

-Persistent links

- Integrate with Google and Microsoft products

-Text to speech functionality

-Predictive search, auto-suggest, spell check

-Cross searching, multiple search modes

- Search on Lexile number or age group

-Integrates with LTI products – Brightspace BB, Moodle etc

-EBSCO is a Discovery provider

-EBSCO content integrates with other discovery systems

- Supports OpenURL

- Interface has 31 language translations

- ADA/508 compliant

- Personal accounts (MyEBSCO)

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: EBSCO Package #3

DATE: 5/10/2024

EVALUATOR NAME: Tim Pellett

EVALUATOR DEPARTMENT: Maine InfoNet

A.3. Authentication

- Supports a variety of auth options – IP, EZProxy, OpenAthens
- Geo auth is limited to EBSCO products only
- Cannot provide geo auth system we have now

A.4. Statistics and Reporting

- COUNTER 5 and non-COUNTER usage reports
- Offers SUSHI
- Robust interface and report options and configuration
- Cannot provide library specific usage without an account

A.5. Training and Marketing

- Six customized online training session per year at no cost
- EBSCO Academy for acct admins and library staff training
- Robust support and training info at EBSCO Connect
- Offers digital and print promotional materials including product buttons and logos with urls, screensavers, media kits. Bookmarks and handouts. Some items customizable, not sure how much though.

A.6. Discovery, Metadata, Linking, and Branding

- Branding color and logo at state level
- Can have parent/child relationship of accounts (already set that way), but for existing paid accounts.
- Can integrate placards, LibChat, LibGuides, Library3lp
- Marc21 records
- Export holdings to GoogleScholar
- Content is not discoverable in search engines.

A.7. Support and Service

- 24/7 support
- Ticketing system with online interface to track support cases
- Robust support system
- 99.9% uptime although they do have occasional component outages
- Status alerts page
- Utilizing AWS with multiple availability zones

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: EBSCO Package #3

DATE: 5/10/2024

EVALUATOR NAME: Tim Pellett

EVALUATOR DEPARTMENT: Maine InfoNet

B.1. Additional Services

- Duplication of narrative of content mentioned.

III. **Appendix H** – Technical Assessment Form

- See notes from Bill Wheeler, State OIT liaison for this RFP.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: EBSCO

DATE: May 11, 2024

EVALUATOR NAME: William Wheeler

EVALUATOR DEPARTMENT: Maine Office of Information Technology

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

While I participated in the meetings, I left the application evaluation to those that are familiar with the library and knew what they needed in the application. I felt I could add very little to this part of the process. I did evaluate Appendix H and my notes for that are below. There was only one Appendix H for all packages submitted by EBSCO.

File 1 – Preliminary Information

- I. **Appendix A – Cover Page**
Submitted as required: Y/N
Yes

- II. **Appendix B – Debarment, Performance, and Non-Collusion Certification Form**
Submitted as required: Y/N
Yes

File 2 – Organization Qualifications & Experience

- I. **Appendix C – Qualifications & Experience Form**
Provided

- II. Subcontractors
No subcontractors used. Subprocessor list supplied.

- III. Organizational Chart
Provided

- IV. Litigation
No litigation to disclose

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: EBSCO

DATE: May 11, 2024

EVALUATOR NAME: William Wheeler

EVALUATOR DEPARTMENT: Maine Office of Information Technology

V. Licensure/Certification (none required)
 Provided

VI. Certificate of Insurance
 Provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202404081

RFP TITLE: Statewide Database Package of Online Resources

BIDDER NAME: EBSCO

DATE: May 11, 2024

EVALUATOR NAME: William Wheeler

EVALUATOR DEPARTMENT: Maine Office of Information Technology

File 3 – Proposed Services and Technical Assessment

I. **Appendix F** – Proposed Content Template

I am not familiar with the State Library, their needs, or whether what was proposed was sufficient. I left the assessment of these areas to those members that could make a far better determination than myself.

A.1. Scope of Services to be Provided: Content

- a. General Interest Resources
- b. Newspapers
- c. Readers Advisory
- d. Prek-12 Resources
- e. Academic Resources
- f. Small Business Resources
- g. Reference eBooks/ Resources
- h. Career, College, & Workforce Building Skills

B. Scope of Services – Additional Content Resources

II. **Appendix G** – Response to Proposed Services Form

I am not familiar with the State Library, their needs, or whether what was proposed was sufficient. I left the assessment of these areas to those members that could make a far better determination than myself.

Part II, Scope of Services to be Provided

- A.1. Content
- A.2. Interface
- A.3. Authentication
- A.4. Statistics and Reporting
- A.5. Training and Marketing
- A.6. Discovery, Metadata, Linking, and Branding
- A.7. Support and Service
- B.1. Additional Services

III. **Appendix H** – Technical Assessment Form

EBSCO did a very good job of answering all the questions presented in Appendix H. They either provided a direct answer to the question or provided information on which attached document to review for the specific answer.



STATE OF MAINE
Maine State Library

Janet T. Mills
Governor

Lori Fisher
Maine State Librarian

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202404081
RFP TITLE: Statewide Database Package of Online Resources

I, Beth Crist, accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine, Maine State Library. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

Neither I nor any member of my immediate family have a personal or financial interest, direct or indirect, in the bidders whose proposals I will be reviewing. "Interest" may include, but is not limited to: current or former ownership in the bidder's company; current or former Board membership; current or former employment with the bidder; current or former personal contractual relationship with the bidder (example: paid consultant); and/or current or former relationship to a bidder's official which could reasonably be construed to constitute a conflict of interest (personal relationships may be perceived by the public as a potential conflict of interest).

I have not advised, consulted with or assisted any bidder in the preparation of any proposal submitted in response to this RFP nor have I submitted a letter of support or similar endorsement.

I understand and agree that the evaluation process is to be conducted in an impartial manner without bias or prejudice. In this regard, I hereby certify that, to the best of my knowledge, there are no circumstances that would reasonably support a good faith charge of bias. I further understand that in the event a good faith charge of bias is made, it will rest with me to decide whether I should be disqualified from participation in the evaluation process.

I agree to hold confidential all information related to the contents of Requests for Proposals presented during the review process until such time as the Department formally releases the award decision notices for public distribution.

M. Elizabeth St

Signature

May 7, 2024

Date



STATE OF MAINE
Maine State Library

Janet T. Mills
Governor

Lori Fisher
Maine State Librarian

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202404081
RFP TITLE: Statewide Database Package of Online Resources

I, **Jenna Davis** accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine, Maine State Library. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

Neither I nor any member of my immediate family have a personal or financial interest, direct or indirect, in the bidders whose proposals I will be reviewing. "Interest" may include, but is not limited to: current or former ownership in the bidder's company; current or former Board membership; current or former employment with the bidder; current or former personal contractual relationship with the bidder (example: paid consultant); and/or current or former relationship to a bidder's official which could reasonably be construed to constitute a conflict of interest (personal relationships may be perceived by the public as a potential conflict of interest).

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I understand and agree that the evaluation process is to be conducted in an impartial manner without bias or prejudice. In this regard, I hereby certify that, to the best of my knowledge, there are no circumstances that would reasonably support a good faith charge of bias. I further understand that in the event a good faith charge of bias is made, it will rest with me to decide whether I should be disqualified from participation in the evaluation process.

I agree to hold confidential all information related to the contents of Requests for Proposals presented during the review process until such time as the Department formally releases the award decision notices for public distribution.

Digitally signed by Davis, Jenna
Date: 2024.05.07 11:04:13 -04'00'

Signature

Date



STATE OF MAINE
Maine State Library

Janet T. Mills
Governor

Lori Fisher
Maine State Librarian

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202404081
RFP TITLE: Statewide Database Package of Online Resources

I, Heidi Cook accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine, Maine State Library. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

Neither I nor any member of my immediate family have a personal or financial interest, direct or indirect, in the bidders whose proposals I will be reviewing. "Interest" may include, but is not limited to: current or former ownership in the bidder's company; current or former Board membership; current or former employment with the bidder; current or former personal contractual relationship with the bidder (example: paid consultant); and/or current or former relationship to a bidder's official which could reasonably be construed to constitute a conflict of interest (personal relationships may be perceived by the public as a potential conflict of interest).

I have not advised, consulted with or assisted any bidder in the preparation of any proposal submitted in response to this RFP nor have I submitted a letter of support or similar endorsement.

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Signature

May 7, 2024
Date



**STATE OF MAINE
Maine State Library**

Janet T. Mills
Governor

Lori Fisher
Maine State Librarian

**AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202404081
RFP TITLE: Statewide Database Package of Online Resources**

I, Timothy Morton accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine, Maine State Library. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

Neither I nor any member of my immediate family have a personal or financial interest, direct or indirect, in the bidders whose proposals I will be reviewing. "Interest" may include, but is not limited to: current or former ownership in the bidder's company; current or former Board membership; current or former employment with the bidder; current or former personal contractual relationship with the bidder (example: paid consultant); and/or current or former relationship to a bidder's official which could reasonably be construed to constitute a conflict of interest (personal relationships may be perceived by the public as a potential conflict of interest).

I have not advised, consulted with or assisted any bidder in the preparation of any proposal submitted in response to this RFP nor have I submitted a letter of support or similar endorsement.

I understand and agree that the evaluation process is to be conducted in an impartial manner without bias or prejudice. In this regard, I hereby certify that, to the best of my knowledge, there are no circumstances that would reasonably support a good faith charge of bias. I further understand that in the event a good faith charge of bias is made, it will rest with me to decide whether I should be disqualified from participation in the evaluation process.

I agree to hold confidential all information related to the contents of Requests for Proposals presented during the review process until such time as the Department formally releases the award decision notices for public distribution.

A handwritten signature in black ink, appearing to read 'Timothy Morton', written over a horizontal line.

Signature

5-7-2024

Date



**STATE OF MAINE
Maine State Library**

**Janet T. Mills
Governor**

**Lori Fisher
Maine State Librarian**

**AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202404081**

RFP TITLE: Statewide Database Package of Online Resources

I, Tim Pellett accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine, Maine State Library. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

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Tim Pellett

Signature

5-07-2024

Date



**STATE OF MAINE
Maine State Library**

Janet T. Mills
Governor

Lori Fisher
Maine State Librarian

**AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202404081
RFP TITLE: Statewide Database Package of Online Resources**

I, William Wheeler accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine, Maine State Library. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

Neither I nor any member of my immediate family have a personal or financial interest, direct or indirect, in the bidders whose proposals I will be reviewing. "Interest" may include, but is not limited to: current or former ownership in the bidder's company; current or former Board membership; current or former employment with the bidder; current or former personal contractual relationship with the bidder (example: paid consultant); and/or current or former relationship to a bidder's official which could reasonably be construed to constitute a conflict of interest (personal relationships may be perceived by the public as a potential conflict of interest).

I have not advised, consulted with or assisted any bidder in the preparation of any proposal submitted in response to this RFP nor have I submitted a letter of support or similar endorsement.

I understand and agree that the evaluation process is to be conducted in an impartial manner without bias or prejudice. In this regard, I hereby certify that, to the best of my knowledge, there are no circumstances that would reasonably support a good faith charge of bias. I further understand that in the event a good faith charge of bias is made, it will rest with me to decide whether I should be disqualified from participation in the evaluation process.

I agree to hold confidential all information related to the contents of Requests for Proposals presented during the review process until such time as the Department formally releases the award decision notices for public distribution.

William W. Wheeler

05/07/2024

Signature

Date