

## School library e-content RFI responses

Baker & Taylor Axis 360

Recorded Books

Mackin Educational Resources

OverDrive

### **1.1 Are you as a vendor interested in providing the described services/supplies to the State?**

Yes. Baker & Taylor presents a unique solution via our Axis 360 digital content platform to allow libraries and other institutions a flexible method for the provision of eBook and digital audiobook access. Participating libraries, schools and other institutions may join the shared resource per the direction of the State.

- o Member libraries will share access to the consortium collection via their own Axis 360 setup.
- o Member libraries will have their own Axis 360 URL (Magic Wall) and patron authentication method to best manage their access.
- o Member libraries will have the ability to run their own circulation, hold and user reports.
- o Member libraries will have the ability to purchase their own local titles, available only to their patrons, seamlessly alongside the shared collection titles. This local collection is called “Unbound” and allows each participating library the ability to gain the advantage of resource sharing through the statewide shared collection while customizing a local collection dedicated to meeting specific local needs.

Recorded Books Inc is pleased to participate in this RFI.

Mackin Educational Resources is interested in providing downloadable and/or streaming e-books, audio and video; databases; and our free eResource management system and eReader, MackinVIA.

Yes, OverDrive is interested in continuing its existing service to the members of the consortium, as well as exploring the possibilities of offering a school-specific product for the State.

### **1.2 Please provide the State with a brief description of your past experience providing similar services/supplies.**

Baker & Taylor has assisted libraries with their book and entertainment collections for more than 180 years. We’ve created Axis 360 to ensure your digital collections run just as smoothly. Baker & Taylor currently manages state-scale digital resource sharing programs on its Axis 360 platform in IL (eRead Illinois), MA (Commonwealth eBook Collection) and AZ (AZ Rural & Tribal Libraries Collection). Axis 360 is a single solution that seamlessly integrates with your library’s technology. It’s easy to use, and, with a cloud-based delivery of digital titles directly to devices, it’s an unrivaled experience for library users. Axis 360 libraries enjoy:

- Print and digital ordering from one source
- Title Source 360 or EDI ordering and

invoicing via ILS systems • eBooks and digital audiobooks in one repository • All-in-one Axis 360 App with single sign-on • Unique Magic Wall digital collections showcase • Dedicated Digital Account Managers assigned to your library • Collection development librarians and programs • API integration with ILSs, Discovery Tool and Mobile App providers • MyLibraryBookstore ecommerce options • Axis 360 Marketing Support website • Automated integration with collectionHQ print and digital analytics We offer econtent solutions for consortia as well as for the independent collections of consortia members. Please see item 7.1 below, for information on client references.

Recorded Books Inc. was founded 36 years ago in Charlotte Hall, MD and is incorporated in the state of Delaware. Our website is [www.recordedbooks.com](http://www.recordedbooks.com). We have served the library community for the past 30+ years and have provided e-content of the highest quality since 2005. Recorded Books is the largest independent publisher of unabridged audiobooks and provider of digital media to consumer, retail, professional, and school, library and infotainment markets. The company owns an exclusive catalog of more than 22,000 audiobook titles narrated by professional, award-winning actors. Recorded Books provides digital audiobooks and eBooks, as well as other compelling third-party content, including digital magazines and films, through its proprietary RBdigital Gateway platform. The Company operates in the United Kingdom through its W.F. Howes subsidiary and in Australia through its Wavesound subsidiary.

Mackin Book Co: We are the sole vendor of digital resources for several consortiums including, Region 1 Education Service Center (ESC), TX; Iowa Area Education Agencies; Boards of Cooperative Educational Services, NY; and Southeastern Libraries Cooperating, MN.

OverDrive is the current supplier of the hosting and digital content for the MontanaLibrary2Go and also provides digital content hosting and lending services to over 33,000 public libraries, schools, colleges, corporations and other lending institutions worldwide.

**1.3 From your past experience, has the State identified all the major components necessary to complete this project?**

BAKER & TAYLOR: The State of Montana may be interested to know what options exist for individual member libraries to purchase and offer econtent for use by that institution's users, in addition to their access to the statewide shared collection. And, in these cases, how the locally-owned content is integrated for display and access by patrons at the member level, and any other features for collection scoping at the individual member library level, etc. Details about accessibility features in respondent's product offerings may be of interest to the State. In limiting responses to Yes or No in question 3.4 of this RFI, the State may not be gathering the detail that would allow evaluation of compliance, and to what degree individual accessibility requirements are met.

Due to publisher restrictions, OverDrive can offer a new consortium for either public libraries or schools, but cannot create new mixed consortiums with multi-type libraries. This will limit the available catalog of titles that can be purchased by the multi-type library consortium.

**1.4 If your answer to question 1.3 is no, please provide information on other necessary components.**

BAKER & TAYLOR: Information on Axis 360 consortium services, including locally-accessed collections and content display scoping, is included in materials attached to this RFI response. Additional accessibility information will be provided in our response to any forthcoming RFP solicitation.

**1.5 Please provide a list of potential problems/risks that the State may encounter during this project. Please provide any ideas or suggestions about how such problems/risks should be addressed in a solicitation.**

BAKER & TAYLOR: Some potential areas of risk and topics that the State may wish to gather information on in its RFP solicitation include: Implementation delays, vendor limitations in supporting multiple ILS environments and authentication requirements, insufficient training or ongoing support, lack of ongoing investment in service infrastructure, selection and ordering tools that are not easy to use, limited content offerings, financial stability of the provider, consortium and member-level reporting capabilities, and ensuring that only age-appropriate content is displayed to K12 member libraries.

RECORDED BOOKS: Zinio for Libraries - Site downtime - support ticket submission for remedy; RBdigital would also send a all-admin notice to affected libraries the downtime was for an extended period beyond one day. Sporadic Internet Outage - local to CA regional internet systems - no remedy by RBdigital since a local risk. OneClickDigital - Site downtime - support ticket submission for remedy; RBdigital would also send a all-admin notice to affected libraries the downtime was for an extended period beyond one day. Sporadic Internet Outage - local to CA regional internet systems - no remedy by RBdigital since a local risk. •IndieFlix - Site downtime - support ticket submission for remedy; RBdigital would also send a all-admin notice to affected libraries the downtime was for an extended period beyond one day. Sporadic Internet Outage - local to CA regional internet systems - no remedy by RBdigital since a local risk. ComicsPlus - Site downtime - support ticket submission for remedy; RBdigital would also send a all-admin notice to affected libraries the downtime was for an extended period beyond one day. Sporadic Internet Outage - local to CA regional internet systems - no remedy by RBdigital since a local risk.

Mackin: We do not have any suggestions in regards to potential problems/risks.

OverDrive recommends creating single type library consortia to avoid publisher restrictions on available content, as well as preventing any titles that should be restricted from certain viewers based on age. By concentrating resources on single type library consortia, each new consortia will have an opportunity to thrive and succeed with its narrowed scope of users and the content available can be greater tailored to meet those users needs. In our experience, one crucial factor for successful delivery is validity of user data provided for authentication--as well as being supplied with complete and accurate contact information for all member institutions. This can be readily addressed at the outset through careful planning of the implementation process. At that stage, a process can also be devise to account for updating this data, either at the State's end through the site's Admin portal, or in collaboration with our Technical Support department.

**1.6 Please provide the State with an estimated timeframe for completing the project.**

BAKER & TAYLOR: Overall Project Timeframe Estimate: 30 – 90 days, depending on service requirements. Site Setup, Authentication programming and Activation of Opening Day content

repository – 21 days (Collection development assistance is available. If suggested order information and lists are requested from Baker & Taylor, please allow time for preparation and consortium staff review and order submission) Library website/social media communications preparation – variable (can be in process concurrent with Site Setup) Staff training – variable (once site setup is complete, including opening day collection activation, B&T will work with consortium and library staff for a period of time to be determined that assures understanding and support for the services prior to public launch) Publisher permissions activities (if current collection access transfer to Axis 360 is required) – 60 days (can be in process concurrent with Site Setup) Legacy content activation on Axis 360 – within 10 days from end of permissions activities Loading replacement MARC records for migrated content into OPACs – variable (consortium/member library activity) ILS vendor/ Discovery Layer vendor API integration – variable (member library activity) A content migration (conversion) timeline will be based upon the number of titles in the collection to be migrated and how long it takes the consortia to reach out to the various publishers for notification. Typically this process will take between two and four weeks. Training and site development can be occurring concurrently with the migration process, so overall, estimate two to four weeks for a project timeline.

Estimated timeframe for project completion is 3-6 months.

OverDrive can complete the project for a new consortia in a very limited time frame, provided there is timely responses from the library members. This can be set up in as little as 2-4 weeks.

**1.7 Please provide the State with your best estimated price range to provide the services/supplies described in this RFI, from lowest estimate to highest estimate.**

BAKER & TAYLOR: Final service requirements for the statewide shared resource collection will determine an offering price in any RFP that follows this RFI process. Given that service requirements are not finalized, we offer the following estimated cost information: Pricing consists of 2 elements: 1-Annual Hosting Fee, based upon the number of member libraries and circulation data. Estimated annual hosting fees, based on the preliminary information provided by the State of Montana, are anticipated to range from \$ 4,000 to \$ 15,000. 2-E-Content Fees, invoiced at the point of content delivery, per item purchased. E-Content is invoiced at publisher list price; pricing for the collection is dependent upon the titles selected for purchase. From time to time, Axis 360 is able to offer publisher promotions that may reduce the cost of content below list prices.

RECORDED BOOKS: OneClickdigital \$25,000.00 Adult Core Collection, up to 60 titles added every quarter at no additional charge. OneClickdigital \$6,000.00 Children's/Young Adult Core Collection, up to 10 titles added every quarter at no additional charge. Zinio \$10,000 access fee plus content IndieFlix \$10,000 Comics Plus \$15,000 All costs are incurred annually.

Mackin: Our standard pricing is up to 45% off publisher list prices with no minimum order requirements. Our eResource management system and eReader, MackinVIATM, is included as a free service with your first order of digital content from Mackin. You are only charged for digital content.

OverDrive cannot provide pricing on a new multi-type library consortium, but is able to provide pricing upon request based on the type of consortia requested. For pricing reference, please see existing contract between OverDrive and State of Montana for MontanaLibrary2Go.

**2.1 What models and formats does the respondent provide for purchasing or licensing content? What are the consortia pricing models and fee schedules for these formats?**

BAKER & TAYLOR: One Copy-One User / Download / License. Some titles carry publisher restrictions regarding the license period for use (finite timeframe / number of circulations). All publishers providing content for Axis 360 support licensing to library consortia on a one-book one-user basis at their standard pricing for libraries. Two key trade publishers require pre-approval for consortia sales. To date, all requests to these publishers for licensing to Axis 360 consortia have been approved. Axis 360 services are invoiced as an annual Hosting, Access and Services fee. Hosting, Access and Services fees are all-inclusive, providing hosting for content, technical support, training, and any ongoing maintenance. Any content purchased is invoiced at the point of delivery of the content; e-content is invoiced at publisher list price.

RECORDED BOOKS: Zinio for Libraries purchases - Annual access fee covering all participating libraries plus content subscription costs. Library picker option if one centralized URL is preferred. Separate URLs for existing subscriptions are also an option. OneClickDigital, IndieFlix, ComicsPlus- Annual access fee covering all participating libraries plus content subscription costs. Library Picker only works for Zinio for Libraries reporting, but would be required for Gateway account setup for the OneClickDigital (if on Gateway), IndieFlix, ComicsPlus

Mackin: Digital content licensing options include single-user, multi-user, perpetual, limited checkout and subscription licensing. We will provide consortia pricing based on the size and scope of each consortium project.

OverDrive: This will vary depending upon the type of consortia established. For a public library consortia, there is one-title/one-user, metered access (time limit or circulation limit), and Max Access annual subscriptions of bundles of content for unlimited simultaneous use from select publishers. For a school consortia, there are additional lending models, such as class sets and short term purchases.

**2.2 How will the consortium retain content or otherwise be compensated should the respondent's company cease operation or lose the publisher's permission to distribute the materials?**

BAKER & TAYLOR: The library retains the license to the title in accordance with publisher policy. The license agreement submitted with this response (Attachment A) outlines how Baker & Taylor will facilitate the transfer of access of purchased digital materials from Axis 360 to another verified vendor with the relevant publisher permissions. Select publishers (e.g. Harper Collins, MacMillan) have access restrictions based on number of circulations per copy or a time frame. B&T will work with the library to gain permission from the relevant publishers to transfer the title access to the new vendor. No files will be delivered to the library. The new vendor will be responsible for providing the file formats appropriate to its platform. Digital content licenses that have been purchased for the collection will remain accessible for the duration of the license, even if future sales are not allowed by the publisher. Content is not removed from customer sites unless limited-license terms have expired.

RECORDED BOOKS: Zinio for Libraries - prorated credit for unused subscription content; existing content would remain on active subscription site unless required by magazine publisher to remove  
OneClickDigital - content available as long as platform subscription active IndieFlix - content removal/loss has no credit •ComicsPlus - content removal/loss has no credit

Mackin: Should Mackin cease operations or lose distribution rights, Mackin will collaborate with the publisher and make every effort to continue your access to purchased content.

OverDrive: In the event of a termination or wind down of the OverDrive will fully cooperate with and support the State's continued access to all of its digital content, as may be permitted by the supplying publishers and rights holders.

### **2.3 Does the respondent provide transition assistance for moving purchased or licensed content to a new platform should the agreement between the respondent and the consortium be terminated?**

B&T will work with the library to gain permission from the relevant publishers to transfer the title access to the new vendor. No files will be delivered to the library. The new vendor will be responsible for providing the file formats appropriate to its platform.

RECORDED BOOKS: Zinio for Libraries - no assistance available OneClickDigital - Other publishers content can be moved to a different platform with publisher permission. Recorded Books publications are not transferrable. IndieFlix -no assistance available ComicsPlus -no assistance available

Mackin: Yes. In the event you decide to cease using MackinVIA for access to your digital resources, we pledge to make a good faith effort to 1) represent your interests to our publishing partners in finding an alternative hosting solution, or 2) provide you with a viable portability mechanism while observing the terms of all material license agreements.

OverDrive: Yes.

### **2.4 Which publishers and suppliers of downloadable e-content does the respondent have available for consortium licensing or purchase?**

BAKER & TAYLOR: Axis 360 offers more than 1 million full-text eBook titles and 60,000 digital audiobooks for Children, Young Adults and Adults. The full catalog of available eBook titles includes new and current fiction and non-fiction titles as well as back list editions; everything from bestsellers to reference editions to classic children's and young adult titles. Titles represent works from over 400 world class publishers and imprints, including all of the Big 6 publishers (Random House, Harper Collins, Macmillan, Hachette, Penguin and Simon & Schuster). Baker & Taylor also works with key publishers in Academic and Scientific areas, including: Yale University Press Harvard University Press Cambridge University Press Columbia University Press Princeton University Press Indiana University Press American Medical Association American Society of Civil Engineers F.A. Davis IGI Global JIST

Works John Benjamins Kogan Page NRC Research McGraw-Hill Wiley New publishers are added regularly; a supplier list, by major supplier, is attached for your reference (Attachment B). All publishers providing content for Axis 360 support licensing to library consortia on a one-book one-user basis at their standard pricing for libraries. Two key trade publishers require pre-approval for consortia sales. To date, all requests to these publishers for licensing to Axis 360 consortia have been approved.

RECORDED BOOKS: Current publisher list for eBooks Akashic Books Baker Publishing Group Barbour Publishing Charlesbridge Publishing Chronicle Books ECW Press Galaxy Press Harlequin Houghton Mifflin Harcourt John Wiley & Sons Kensington Lerner Publishing Group MacMillan Publishers Poisoned Pen Random House Source Books Tyndale House Publishers Unbridled Books Workman Publishing Recorded Books - Distributed Digital Publishers Alcazar AudioWorks Audio Bookshelf Audio Evolution Audio Holdings AudioGO Authors Digital Awdeeo Baker Publishing Group Beacon Press Blackstone Audio, Inc Books on Tape Brilliance Audio ChristianAudio.com Columbia University Press Crossway Audio Dorchester Encyclopaedia Britannica, Inc. Full Cast Audio Galaxy Press getAbstract Hachette Audio HarperCollins Publishers Harvard University Press HighBridge Company InterLingua Publishing InterVarsity Press Island Press Kent State University Press Kessinger Publishing Knowledge Products, Inc. L.A. Theatre Works Linguaphone Listen & Live Audio, Inc. Macmillan Audio Made for Success, Inc. M-Y Books Naxos Audiobooks Oasis Audio Penguin Group (USA), Inc. PrepLogic LLC Random House Audio Publishing Group Reagent Press LLC Reality Press Sapphire Digital Scholastic Audio Simon & Schuster Audio Sounds True Tantor Media, Inc The New Press Treasure Publishing Trenna Productions University of California Press University of Michigan Press University of North Carolina Press Weston Woods Studios Yale University Press Zondervan

Mackin: We work with over 100 digital content publishers including ABC-CLIO, ABDO, August House, Bancroft Press, Bearport, Bellwether, Candlewick Press, Capstone, Cavendish Square (Rosen), Crabtree, Creative Teaching Press, Dawn Publications, Enslow (Rosen), Flowerpot Press, Gareth Stevens, Hachette, HarperCollins, Highlights, Inc., Independent Publishers Group, Jump!, Mason Crest, Peachtree Publishers, Purple Toad Publishing, Saddleback, Soundzabound and TumbleBookCloud, and our list continues to grow. Please see attached list of existing digital publisher contracts. We will provide consortia pricing based on the size and scope of each consortium project.

OverDrive offers over a million items of digital content from over 5,000 publishers. This list will vary slightly between public library consortia rights and school consortia rights.

**2.5 For downloadable e-books and audio: do collections offered cover the most recent three years of published bestseller literature or content? For other downloadable and streaming formats, please describe the scope of your available collections.**

BAKER & TAYLOR: Yes, titles offered cover the most recent 3 years of published bestseller literature, and more. Please see 2.4 above for details.

RECORDED BOOKS: Content includes publications dating back to the first eAudio publications in 1979 through current eBook and eAudio publications as recently as today.

Mackin offers over 350,000 digital resources including the best-selling titles attractive to the PK-12 educational market in both audio and eBook format, including: *The Sword of Summer*, *Out of My Mind*, *Paper Towns*, *The Rabbit Who Wants to Fall Asleep*, *The Martian*, *Why Not Me?*, *Memory Man*, and many others. Mackin's downloadable and streaming formats include 300,000 eBooks, 50,000 digital audio books, hundreds of databases, interactive eBooks from 12 different publishers and streaming video from TMW Media Group and Visual Learning Systems. We offer a variety of licensing options including single-user, multi-user, perpetual, limited checkout and subscription. As soon as our publishers make eVersions of print content available to us, they will be available to you for purchase.

Yes, the OverDrive catalog has a large majority of the eBook and audiobook bestsellers for the last three years. OverDrive also offers streaming video titles from major studios on the same platform, and these videos can be purchased under other lending models, such as cost-per-circ.

## **2.6 Respondent must describe the broad subject categories covered by e-content collections.**

BAKER & TAYLOR: Please see item 2.4 for publisher and audience coverage.

RECORDED BOOKS: OneClickDigital offers bestselling and popular content for mobile and desktop users. Zinio provides popular magazines in art, entertainment, lifestyle and more. They also include interactive elements. 1 IndieFlix includes movies from all popular genres, including Film festival features and shorts, Classic movies and television programs, and content from more than 50 countries, including the best of Sundance, Cannes, Tribeca and more. ComicsPlus makes thousands of digital graphic novels and comics available. It's also an online streaming service that provides libraries with access to thousands of digital graphic novels, comic books and manga.

Mackin: Our digital content caters to patrons from early childhood through young adult. Our collection appeals to a variety of interests, including animals, adventure, mystery and suspense, romance, sci-fi and fantasy, graphic novels, folklore, fairytales, mythology, historical fiction and others. Our quality digital resources actively support educational growth in the community through categories such as history, math, social studies, science, technology and transportation, geography, classic literature and other topics.

OverDrive offers hundreds broad categories of digital content, including fiction, nonfiction, trade, professional development, classic literature, historical fiction, young adult, women's fiction, women's studies, writing, urban fantasy, urban fiction, true crime, action, adventure, African American fiction and nonfiction, art, beginning reader, busines, biography and autobiography, careers, cartoons, chick lit fiction, children, Christian fiction and nonfiction, religious titles, comedy, computer technology, comic and graphic books, crime, crafts, cookbooks, environment, education, fantasy, epic fantasy, erotic literature, feature films, foreign language study, games, gardening, geography, general fiction, health care, health and fitness, historical fiction and romance, history, holidays, home decor and design, humor fiction and nonfiction, human rights, juvenile literature, etc.

## **2.7 What file types does the respondent provide for each format?**

BAKER & TAYLOR: eBooks and digital audiobook content are provided in Axis 360 format for use in the Axis 360 apps for Android and iOS devices and Window-based PCs. Content is also delivered in industry-standard EPUB and/or PDF for use on devices that require Adobe DRM.

RECORDED BOOKS: Zinio -all magazines are streamed or downloaded as flowed-pdf files in the Zinio Reader for online streaming in a browser; and/or the Zinio for Libraries apps for iPad, iPhone, Android, Kindle Fire/HD/HDX. A separate file format is not available for use in third-party readers. OneClickDigital, IndieFlix, ComicsPlus all stream into a proprietary browser reader/viewer for each service. The OneClickDigital app also plays the eAudio and/or eBook reader. A separate file format is not available for use in third-party devices.

Mackin: EBook files from the publisher are converted into MackinVIA™'s proprietary format in order to provide patrons with an enriched reading experience. Registered patrons enjoy highlighting, resource citing, dictionary lookup, designating favorites, and note-taking capabilities. Patrons may view basic eResource information including title, author, due date and table of contents; toggle between single-page and dual-page views; select background and text color options; jump to page numbers; and bookmark pages. Our MackinVIA eReader is compatible with nearly all desktop, laptop and mobile devices and is also available as a free app from multiple app stores.

OverDrive: eBook: EPUB, PDF, OverDrive Read (browser-based reading format that does not require download). Audiobook: MP3 and OverDrive Listen (browser-based streaming audio format that does not require the user to download the title to access it). Video: Streaming

## **2.8 How will the respondent notify participating libraries when or if titles are added or subtracted from collections or when significant changes are made to the content, indexing, or interface to any collection? The respondent must provide narrative of how it will provide this service.**

BAKER & TAYLOR: Content licensed for use on the Axis 360 platform is not removed, unless publisher license lifetime limitations have been reached. For metered content, advance notification of upcoming expirations are sent to the Axis 360 Administrator who may determine that titles or copies should be reordered. 1) Added / Deleted: Library administrator(s) will receive an email notification when ordered titles have been delivered or of expiring titles that are to be deleted. 2) Expiring: Administrators receive advance notice of expiration for titles licensed under limited-access models to allow for reordering. Expiration notices are sent when limited-access titles reach their limits and have been removed from the customer's repository. Some titles may have publisher restrictions regarding the number of available circulations or the length of time associated with the license. B&T provides an automatic notification to the Administrator prior to the expiration of any such title license. The Administrator determines the threshold "number of days or circulations prior to expiration" required to trigger the notification. These notification reports, delivered weekly via e-mail, are available to make the Administrator aware of any pending expiration dates. Additionally, for your convenience, the title(s) in question will also be delivered in a Title Source 360 cart (our online selection and ordering site) for easy review and ordering.

RECORDED BOOKS: Content is added for purchase as new metadata is received from publishers, allowing for pre-ordering of content. Content is only removed if rights are lost to be sold in the library market. The library will be notified by e-mail when titles and content are delivered.

Mackin will notify the purchasing party of new titles added to the collection at the time an order is fulfilled and loaded into MackinVIA. This can be done in the form of both automated shipment notifications and/or emails sent from the Mackin project manager to a designated contact from the purchasing party. With the exception of expiring subscriptions, Mackin will not subtract titles from a collection unless asked to do so by the purchasing party. The purchasing party may opt-in to subscription renewal notifications.

OverDrive's Marketplace provides touts of new releases, sales, and offers the ability to search for top titles not currently in the collection. OverDrive sends out newsletters to alert of new content and alerts libraries in advance of significant changes coming to the interface. If titles are removed by the consortium admin, they can run a report to pull title list of all weeded titles to distribute to consortium members for their records.

## **2.9 How will the respondent compensate the consortium for content that is removed by the respondent from the shared collection?**

BAKER & TAYLOR: Digital content licenses that have been purchased for the collection will remain accessible for the duration of the license, even if future sales are not allowed by the publisher. Content is not removed from customer sites unless limited-license terms have expired. If content must be removed for other reasons, such a corrupt or unrenderable file, the consortium will be credited for the affected titles.

RECORDED BOOKS: Zinio for Libraries - See 2.2 - all content is curated and selected by library  
OneClickDigital - no assistance available  
IndieFlix - no assistance available  
ComicsPlus -no assistance available

Mackin: With the exception of expiring subscriptions, Mackin will not remove titles from a collection unless asked to do so by the purchasing party. The purchasing party may opt-in to subscription renewal notifications. This varies from case-to-case and the reason why content may need to be removed.

## **2.10 How does the respondent add "copies" to titles in the existing collection when needed?**

BAKER & TAYLOR: Additional copy licenses can be purchased at any time to supplement the consortium shared collection titles.

RECORDED BOOKS: Zinio for Libraries - all content is curated and selected by library, when title added either full year or prorated subscription is added to the collection within 1 business day upon receiving the order  
OneClickDigital - core collection titles added quarterly; subscription titles as they publish, individual titles selected by library and available within 1 business day upon receiving the order.  
IndieFlix -IndieFlix curates full collection and adds titles ongoing.  
ComicsPlus - CP curates full collection and adds titles ongoing.

Mackin: After receiving your order, Mackin processes the order and places the additional copies into your MackinVIA account.

The additional titles would need to be purchased within the OverDrive Marketplace and they are added to the site within hours of purchasing for lending capabilities.

### **2.11 How are titles added or made available in the consortium collection?**

BAKER & TAYLOR: The consortium will be provided with access to Baker & Taylor's Title Source collection development and acquisitions website. All digital content available for Axis 360 is cataloged in Title Source, which also provides enriched metadata to aid in selecting appropriate content for the shared collection. Ordered content, as available for distribution, is activated on the consortium website within 2-3 hours of order placement.

RECORDED BOOKS: Zinio for Libraries - See 2.2 - all content is curated and selected by library  
OneClickDigital - no assistance available IndieFlix - no assistance available ComicsPlus - no assistance available

Mackin: The purchasing party may add copies to titles in an existing collection simply by placing an order with Mackin. Additional copies become available in MackinVIA at the time of order fulfillment.

Titles are purchased within the OverDrive Marketplace and then made available for lending at the OverDrive-hosted consortium website.

### **2.12 How can titles be removed from the consortium collection?**

BAKER & TAYLOR: Titles that are no longer wanted can be removed by Baker & Taylor on request. The consortium should then remove corresponding MARC records from its catalogs.

RECORDED BOOKS: Zinio for Libraries - submit title(s) to be removed - removed by RBdigital within 1 business day. OneClickDigital - library admin may suppress any title - removed/suppressed immediately IndieFlix - not available ComicsPlus - not available

Mackin: The consortium administrator may inactivate materials from the consortium collection, making them inaccessible to patrons. Mackin may remove titles permanently upon request.

OverDrive: Titles can be weeded from the collection through the admin and purchasing portal, OverDrive Marketplace.

### **2.13 Can registered end-users place holds on titles?**

BAKER & TAYLOR: Yes. Users wishing to place holds provide an email address and are notified by email when holds become available for them. The consortium will set the number of days a user will

have to respond to a holds notification before the next person in queue is offered the title. Users may also suspend holds if they are not ready to borrow, and will retain their position in the holds queue once the suspension is removed.

RECORDED BOOKS: Yes- OneClick Digital allows holds. IndieFlix, Zinio, and ComicsPlus have unlimited availability, no hold is needed to check out content.

Mackin: Yes, a registered end-user may request titles currently checked out to another user. Once the title becomes available, the registered end-user will have a limited window of time (determined by the MackinVIA administrator) to checkout the digital resource. If an email address is associated with the patron account, an email notification will be sent indicating the title's availability.

OverDrive: Yes.

#### **2.14 Can registered end-users make purchase requests or recommendations? If "yes," please describe this process.**

BAKER & TAYLOR: The consortium will have the option to enable Patron Recommendations on its Axis 360 website. When Patron Recommendations are enabled, user search results will include all items available for sale on Axis 360, not just titles currently owned by the consortium. Users can recommend titles for purchase via the interface, and requests are reviewed by Library Administration staff for purchase. Users can elect to be placed on the holds queue for items they recommend that are purchased and will then have priority access to the title when it becomes available.

RECORDED BOOKS: OneClickDigital can make requests by logging into their account, clicking on My Account, then choosing My Recommendations. IndieFlix, ComicsPlus, and Zinio users do not have this capability.

Mackin: Registered end-users cannot make purchase requests or recommendations from within the MackinVIA system. However, end-users may rate currently purchased resources on a five-point scale from within MackinVIA.

Yes, OverDrive offers the ability to add a "Recommend to Library" button to the OverDrive-hosted website where users can recommend titles to be added to the digital collection.

#### **2.15 What options are available for providing a backup of all online accessed collections?**

BAKER & TAYLOR: All repository content resides on B&T servers and may be restored from backup, should any issues arise. B&T performs daily backups and utilizes geo-redundancy to ensure there is no loss of content.

RECORDED BOOKS: Zinio for Libraries - RBdigital manages multiple server backups OneClickDigital - RBdigital manages multiple server backups IndieFlix - IF manages multiple server backups ComicsPlus - ComicsPlus manages multiple server backups

Mackin-hosted content is backed up nightly to redundant off-site servers, and back-up drives to the back-ups are stored off premises. Publisher-hosted material is hosted on the publisher's server(s). Mackin provides content over the internet and no content will be stored on the library's servers.

OverDrive's agreements with its supplying publishers require it to host the digital content on its' own secure servers. OverDrive backs up its servers according to industry-recommended practices.

**2.16 Respondent must explain any lag time between the publication dates of print new titles in the subject areas offered and the time in which they are available through the e-content service in digital format.**

BAKER & TAYLOR: In most cases, including content from the major trade publishers, the e-version and the print edition of a title are released simultaneously. However, the timing of the release of any version/format of a work is at the discretion of the publisher.

RECORDED BOOKS: Zinio for Libraries - typically simultaneous or up to 1-business day lag  
OneClickDigital - simultaneous or as full content metadata is available from the source publisher  
IndieFlix - simultaneous ComicsPlus - typically simultaneous or based on publisher requirements

Mackin: Availability of eBook versions is contingent upon the publishers. As soon as publishers make eVersions available to Mackin, the eVersions will be available for purchase.

OverDrive does not control any lag time that may exist between a title being available in print and it being available in digital format. OverDrive is constantly working with publishers to ensure that this is usually the same date and in most cases, the digital copy is available at the same time as the print, and OverDrive offers pre-sale capabilities for most of these popular titles.

**2.17 What is the respondent's policy with regard to fair use?**

BAKER & TAYLOR: Baker & Taylor is a distributor, not an originator, of content and does not have a policy regarding fair use. Access and use of content via the Axis 360 platform is determined by publisher permissions and DRM settings that are managed by the services.

RECORDED BOOKS: Each user has right in terms of use to use online and/or print of relevant study material for their own personal/private use. They may not duplicate and/or resell for other users.

Mackin: Authorized patrons may access and/or download digital content on the MackinVIA platform for any use consistent with the relevant fair use doctrine or similar law in your jurisdiction. However, content providers have the discretion to restrict functions such as copy/paste, printing and text-to-speech.

OverDrive respects a school and library's rights to fair use and allows digital content to be used in any manner that falls under fair use that does not violate OverDrive's terms with its supplying publishers.

**2.18 Montana State Library is interested in opportunities for increasing access to e-content through collaboration with other state library agencies as well as with authors, public libraries, publishers, and other content creators, distributors, and organizations. Please describe any collaborative initiatives in which your company has engaged.**

BAKER & TAYLOR: Baker & Taylor is committed to helping libraries connect readers with community resources. For example, our Axis 360 digital platform is powering digital resource sharing between Johnson County Library and the Blue Valley Schools and other school districts around Kansas City, KS. Ensuring that students can use ebooks and e-audiobooks from their school as well as from their public library, on the same familiar platform, provides continuity of access and increases utilization of publicly-funded resources. We are also extremely proud to be the content technology partner to the White House's new Open eBooks Initiative, contributing our Axis 360 infrastructure and services. This important project, coordinated by the White House and involving B&T, DPLA, First Book and New York Public Library, provides age-appropriate digital books to underprivileged children throughout the United States. Baker & Taylor is also supplying collection development expertise and tools so that the thousands of titles that participating publishers are donating to the program are aligned to the reading level of these deserving young readers.

RECORDED BOOKS: Zinio for Libraries - regional publications may contact Zinio.com for inclusion in Zinio for Libraries OneClickDigital - regional publishers may contact Recorded Books acquisitions for inclusion in OneClickdigital. IndieFlix - regional film producers/agencies may contact IndieFlix.com for submission review. ComisPlus - not applicable

Mackin: While not an exhaustive list, Mackin has collaborated with EasyBib, Symbaloo, Aeries SIS, Renaissance Learning, StudySync, Alexandria, SirsiDynix, Clever, Atrium, Eduvision, Finalsite, Focus School Software, Innovative, Mandarin Oasis, L4U, Opals, Oracle and Munis. Mackin's strategic partnerships enable it to offer free promotional content, increased eReader functionality, and clean integrations with various library management and purchasing systems. Mackin partners with libraries and the community through its free Funds4Books library fundraising service. All monies donated go directly towards the purchase of library content. HereBeFiction.org is a collaborative effort to promote the less familiar fiction works available from publishers traditionally known for providing informational texts. HereBeFiction.org supporters work with these publishers to provide librarians with free or discounted copies of these works. Mackin's publisher connections have been integral to the success of the project, and the MackinVIA platform provides easy access to the digital titles. Please visit <http://www.herebefiction.org/> for more information.

OverDrive collaborates with thousands of publishers and authors, as well as associations such as the ALA and other library advocacy groups to increase access to digital content. OverDrive offers a Local Content feature, where libraries can upload locally sourced and owned digital content (not purchased from a third party vendor). OverDrive can also accept digital content transfers from other vendors in the event a library no longer wishes to access those titles on another platform, subject to applicable publisher permissions. OverDrive also has user groups and attends hundreds of trade shows throughout the year

to gain insight and knowledge from other industry veterans, as well as libraries and users, on how best to improve the product and expand its offerings to those most desired by the user community.

**2.19 Does the respondent provide the option to automatically acquire or purchase OCLC MARC records for purchased titles? Describe the process for delivering catalog records to the consortium for participating libraries.**

BAKER & TAYLOR: Newly ordered eBooks and eAudiobooks are added to the Library's Axis 360 collection within 2 hours of receipt of order. Baker & Taylor MARC-formatted records are available (free of charge) within 24-48 hours. Customized MARC records, including OCLC cataloging if available, can be purchased. Fees associated with customization are dependent upon the level of customization required. If updates or customization is required, please expect 5-7 days for fulfillment. MARC records are provided on a per-order basis upon fulfillment.

RECORDED BOOKS: Libraries are set up with the FTP site for delivery of records, as well as the credentials required to log in to the FTP site. Through instructions for downloading MARC files and uploading them to ILS are also provided. Libraries are notified via email each time new files are delivered and available.

Mackin: Complete, available MARC records are delivered together with Mackin's digital content at no additional charge. Libraries may opt-in to an automated shipment notification to receive MARC records by email or they may download them from Mackin.com.

Yes, OverDrive offers OCLC MARC records for purchased titles. These are ordered by OverDrive on behalf of the library and the library will receive OCLC MARC records with a custom URL in field 856 specific to your library. These are charged as a pass-thru cost with no markup from OverDrive.

**2.20 The respondent must describe the authority control for names and subjects in the database. Respondent must indicate the source of authority. Respondent must respond with description of authority control system or systems used in conjunction with the respondent's database(s).**

BAKER & TAYLOR: Records provided by Baker & Taylor include both Library of Congress records and original records created by our in-house professional cataloging librarians. These bibliographic records are created by consulting LC authority records, in accordance with current cataloging rules and national standards.

RECORDED BOOKS: Zinio for Libraries - Publisher sets publication title; RBdigital sets genre/subject grouping OneClickDigital - Publisher sets publication title; RBdigital sets genre/subject grouping IndieFlix - Film producer sets film title; IF/RBdigital jointly set genre/subject grouping ComicsPlus - Comic/Graphic novel publisher sets title and genre/subject grouping

Mackin: Depending on the needs of the library, Mackin uses the Library of Congress Authorities website or the Sears List of Subject Headings as the source of authority.

OverDrive receives this information in the metadata feed from its supplying publishers.

**3.1 How is content delivered? Any special plug-ins, extra browser plug-ins or special or proprietary software required must be described.**

Axis360 content is accessed online via Wi-Fi or cellular connection and content is downloaded to our Axis360 Applications which support Android, iOS and Windows devices, and Adobe Digital Editions for use on Mac and dedicated ereader devices that require Adobe DRM delivery.

Zinio-PC requires Chrome, FireFox, IE11 for instant stream reading. Macintosh requires iOS Safari, iOS Chrome, or iOS Firefox, Adobe Reader/Flash for online streaming. OneClickDigital- OneClickdigital offers free download software for PCs and Macs to access eAudio. The OneClickdigital Media Manager can be downloaded to a users PC or Mac to handle the download of eAudio content to the computer and transfer onto a portable device. For eBooks, users can install Adobe Digital Editions to handle the download of eBook content to their PC or Mac and transfer onto their portable device. IndieFlix-Flash is required to view the video lessons ComicsPlus-Does not require any additional software

Mackin: Digital content is delivered through our eResources management system and eReader, MackinVIA. MackinVIA is a SaaS and is accessed online through standard browsers. No extra plug-ins are required. The MackinVIA app can be downloaded onto almost all desktops, laptops and mobile devices and also downloaded from multiple app stores.

OverDrive digital content can be downloaded by the user to their device and accessed with the free OverDrive app, or users can choose the OverDrive Read or OverDrive Listen format, which is a browser-based reading format that does not require download and can be synched across user devices with the OverDrive app. No additional software is required other than the free OverDrive app for mobile or desktop, or a modern web browser for the browser-based formats.

**3.2 Is the respondent able to provide access to content from the respondent's central server(s) via the Internet?**

Yes

**3.3 What is the minimum hardware, software, and bandwidth capability needed to access the respondent's system?**

BAKER & TAYLOR: Desktop Reader Operating system Windows XP – Windows 10 Internet connection 1 Mbps or better (broadband recommended) Software Axis 360 Desktop Reader Hardware 70MG of Free Space Axis 360 iOS App Operating system iOS 8 or later Device iPhone 4 or later / iPad 2 or later Internet connection 3G connection or better or WiFi Software Axis 360 App from the App Store Axis 360 Android App Operating system Android 4.2 or later Internet connection 3G connection or better or WiFi Software Axis 360 App from the App Store

RECORDED BOOKS: OS requirements for the MAC are OS 10.7 or higher OS requirements for Windows is Vista or higher. Apple devices require iOS 5.0 or later. Android devices require OS 2.3.3

and later. The system requirements for Zinio are: PC System Requirements Supported Operating Systems Windows 7 Windows Vista Windows XP (Professional, Home, and Tablet PC editions) Windows 2000 To browse this website cookies and JavaScript must be enabled. The most recent version of Macromedia Flash Player is required A high-speed internet connection (3000kb/s or faster is recommended for best user experience Computer Configuration Pentium V (or more powerful) processor At least 2 GHz processor speed At least 512 MB of Ram At least 1 GB free hard disk space Mac System Requirements Supported Operating Systems Mac OS 10.3 and higher Linux To browse this website cookies and JavaScript must be enabled. The most recent version of Macromedia Flash Player is required 3 IndieFlix content can be viewed via streaming on any computer, smartphone, or tablet with an internet connection. ComicsPlus content can be viewed via streaming on any computer, smartphone, or tablet with an internet connection.

Mackin: The system must support a modern browser and sufficient bandwidth to support active reading sessions, which we estimate at approximately 2MB per student over a 40-minute period.

OverDrive: An internet connection and a device is all that is required to access the system. Once a title has been downloaded or cached with the browser-based formats, the user no longer needs internet access.

**3.4 Does the respondent's service meet Americans with Disabilities Act (ADA) electronic access standards?** All yes except Midwest Tape

**3.5 Does the respondent have alternate Internet access provision in place, such as mirrored servers, in case the primary connection becomes unavailable?**

BAKER & TAYLOR: Our server farm has multiple redundant servers, and we have the ability to spin up new environments in a short time frame as necessary to resolve system strain or other issue. We have inherent fault tolerance features in the web farm, application farms, data center network connectivity, and our clustered database tier to ensure high-availability. Where necessary, our technical staff will work around the clock to address any unplanned outages or server faults.

RECORDED BOOKS: Yes

Mackin: Yes. All data in Mackin's system is backed up nightly to redundant off-site servers, and back-up drives to the back-ups are stored off premises.

OverDrive: Yes.

**3.6 What authentication methods are available to registered library patrons of participating libraries? Describe the method of authenticating library users in consortia environments where users access a shared catalog system and in single library environments where users access a standalone system.**

BAKER & TAYLOR: Axis 360 offers a range of authentication options and can accommodate differing authentication for individual members in shared collections. Authentication methods include barcode prefix, SIP2, NCIP, EZProxy, Polaris API and Innovative Interfaces Patron API and others.

RECORDED BOOKS: SIP2, IP, Referring URL, Barcode, Access Key, EZ Proxy

Mackin: Various types of authentication are available to libraries in both shared catalogs and standalone systems. Authentication types range from basic username/password to IP authentication to single-sign on integrations with certain catalog system types. We can also integrate with Active Directory systems, LDAP, SAML, SIP2 and Google.

OverDrive: Library users of a shared catalog system are able to select their specific library when signing in. We then connect them to their library's specific ILS system to authenticate their library card, and access the site. Consortia with one ILS system will have a single sign on page for all users, and we're able to authenticate users based on the specific settings for their library's barcodes when signing in. For single library environments and standalone systems, we can connect to the library's ILS to authenticate users.

### **3.7 Can respondent offer the following capabilities through its end-user interface?**

- **Browse contents by genre and format;**
- **Search, browse, and access content through interface appropriately responsive to browser or mobile device;**
- **Filter results through several optional limiters, including availability, subject, and Lexile Measure; and**
- **Discover and recommend additional titles to the consortium Selection Committee through an automated process**

BAKER & TAYLOR: Axis 360 allows for patron searching by author, narrator, title, ISBN, subject, keyword or phrase, publisher, and product series, as well as the full text of each title's synopsis. Axis 360 also provides full collection browsing by BISAC subject categories, with additional sort and filter capabilities. Search and Browse results can be sorted and filtered by format and availability in browser and mobile app environments. Additional purchase recommendations by users can be directed to administration and selection staff through the Axis 360 services when Patron Recommendation are enabled.

RECORDED BOOKS: Yes\* \*The Lexile Level is not included in the records.

MackinVIA adapts to the best viewing experience regardless of device. All filter options mentioned above are available except title availability. However, in MackinVIA, eBooks will display "out" if checked out. An automated process is not available for end-users to discover and recommend

additional titles. However, end-users may rate current MackinVIA resources to give feedback on the types of materials they enjoy.

Yes

### **3.8 Can the consortium, participating library, or user configure various screen display formats?**

BAKER & TAYLOR: Yes.

RECORDED BOOKS: Zinio-Library collection site is branded by text or logo. Library admin may also provide direct communication banners. OneClickDigital-Landing page dashboard branding IndieFlix-Landing page dashboard branding ComicsPlus-Landing page dashboard branding

Mackin: Participating libraries have access to custom default display options, including homepage default, number of results per page, reading program search parameters, and some visual images. The eReader has various display options as well such as page right/left or scroll up and down; background and text color changes including sepia tone background, black background/white writing, or white background/black writing; full screen; and toggling between single and dual page views.

OverDrive: The consortium can configure the custom curated collections on the OverDrive-hosted consortium website and create custom carousels of featured titles.

### **3.9 State the actual hours of availability 365 days per year based on data on system availability during the most recent 12 months.**

BAKER & TAYLOR: Our servers are highly redundant, and we can bring new servers online when the need arises. While we don't have specific stats for the previous 12 months, our uptime, not including scheduled maintenance, is above 98% and the system is highly stable. For scheduled maintenance, notification is provided one week in advance and will occur in the early AM on Saturday or Sunday.

RECORDED BOOKS: Zinio-Uptime is consistently greater than 95%. Regular maintenance is typically scheduled in the early morning hours based on EST. Users are notified of any downtime beforehand. OneClickDigital is fully available to end users 99.5% of the time. The library will be notified a week before maintenance. IndieFlix is fully available to end users 99.5% of the time. The library will be notified a week before maintenance. ComicsPlus is fully available to end users 99.5% of the time. The library will be notified a week before maintenance.

Mackin: System availability was at 99.96% from July 1, 2014 to June 30, 2015.

OverDrive: There has been no periods of complete system downtime for the State's OverDrive service in the last year.

### **3.10 Provide data on typical response times experienced by end-users when searching a collection. Respondent must provide data in tabular format on a range of estimated typical**

**response times experienced by end-users when streaming or downloading available files of various sizes, including audio and e-book files. System response time is defined as the time the respondent's computer or device receives a signal (a user has selected a title and initiated the download or streaming process), to the time the title is available for use on the patron end.**

BAKER & TAYLOR: Download times are heavily predicated on the quality of the connection being utilized by the requesting device. Both audio and eBook content are delivered from cloud environments utilizing high bandwidth connections. File sizes for content can range from 1K to 1.2GB. Download times can range from several seconds to several minutes or longer depending on the title selected and capacity of the device's connection at the time of access. eBook titles must be downloaded in full before they are available for reading on user devices. Digital audiobooks initiate listening as soon as the download begins, while the file download continues in the background.

RECORDED BOOKS: Zinio, IndieFlix, and ComicsPlus titles are available right away. OneClickdigital titles typically take 1 to 2 minutes, depending on the length of the book and internet access.

Mackin: System response time for all content, including audio and eBook files of all sizes, is less than half a second.

OverDrive: An eBook can be downloaded in less than 10 seconds, but may be longer dependent on size of the file and user internet connection. The average response time for a user doing a search on the hosted website is less than .5 seconds.

**3.11 Respondent must be able to provide open URL services or support for all the content included in the service. Options for efficient, cost effective utilization of Open URL draft standard exist for libraries.**

BAKER & TAYLOR: Not applicable. Our content does not fit the circumstances for Open URL support.

RECORDED BOOKS: Zinio-Does not support Open URL OneClickDigital-Does not support Open URL  
IndieFlix-N/A ComicsPlus-N/A

MackinVIA does not currently support open URL services but we can certainly evaluate the standard for future implementation.

OverDrive: Unable to provide response to this question without additional context.

**4.1 What is the process for adding or removing participating libraries?**

BAKER & TAYLOR: At the time of service activation, the consortium will provide a complete list of libraries that are authorized to participate in the consortium shared collection. On a quarterly basis, new libraries may be added or removed from the services. Requests for additions and removals will be provided to Baker & Taylor by the consortium in writing when changes are desired. Baker & Taylor will inform the consortium in writing when new libraries have been activated or existing member libraries have been removed from the services.

RECORDED BOOKS: Zinio for Libraries - Library Admin notifies RBdigital Staff - updated within 1 business day OneClickDigital - Library Admin notifies RBdigital Staff - updated within 1 business day IndieFlix - Library Admin notifies RBdigital Staff - updated within 1 business day ComicsPlus - Library Admin notifies RBdigital Staff - updated within 1 business day

Mackin: Requests for adding or removing libraries may be sent to Mackin. When adding a library, Mackin will create a new Mackin account and a new MackinVIA account for the new site. Per the direction of the purchasing party, appropriate resources will be added to the site's account. Mackin will remove a library per the purchasing party's request and the site's purchased digital resources will be removed with consideration as to whether the items were purchased from Mackin or other vendors.

OverDrive: Depending upon the terms of the contract executed with the State, the new participating libraries may need to sign an acknowledgment of the agreement, or notification from the state of a new library joining may be all that is required. To remove a library, OverDrive would need notification from the library or State that it wishes to be removed from the service and that process can be done quickly by OverDrive's internal team.

#### **4.2 Is respondent able to add libraries using disparate Integrated Library Systems (ILS)?**

BAKER & TAYLOR: Yes.

RECORDED BOOKS: Yes, Recorded Books Inc. is able to add libraries using disparate ILS.

Mackin: No.

Yes, OverDrive is compatible with and has authenticated with many different ILS systems. In the rare event a library does not have a compatible ILS, OverDrive offers a no cost alternative, OverDrive Library Card Manager, to use for patron authentication.

#### **4.3 What training materials are available at no additional cost to participating libraries?**

BAKER & TAYLOR: Baker & Taylor will provide appropriate training and support for all levels of consortia and library administration and staff including live sessions when required, online web sessions, recorded sessions accessible on demand, and digital & printed instructional and promotional materials. Sessions will include both the user experience for front line staff as well as administrative site for managing and running circulation and usage reports for administrators. Axis 360 library users will have direct access to training and information materials including: • How To documents per specific reader, device and operating system • Interactive Online Help portal including FAQs, articles and searchable answers • YouTube instructional videos per reader, device and operation system We provide onsite and offsite training for staff and the public depending on the needs of both.

RECORDED BOOKS: We offer online training via webinar, or live onsite at no charge.

Mackin will work with you and your staff to provide a seamless transition to the MackinVIA platform and the addition of digital content. Group or special training needs can be addressed through custom webinars and our online MackinVIA help guides and videos are easily referenced. Libraries may also contact Customer Service with questions at any time. All phone calls are answered by live people and after-hours calls are personally relayed to Customer Service the following business day.

At the OverDrive Learning Center (<http://partners.overdrive.com/learning-center/>), OverDrive offers no-cost on-demand training sessions and live training session enrollment for staff members at your organization. All of the above resources are public facing websites, meaning users can watch the same videos that staff watches, as well as learn about the OverDrive service from the extensive Help pages at <http://help.overdrive.com/>. There are FAQs, and how-to videos to demonstrate using the service on all compatible devices across all available formats from OverDrive!

#### **4.4 What outreach materials are available at no additional cost to participating libraries?**

BAKER & TAYLOR: Axis 360 Marketing Support Website is the dynamic marketing program designed to support libraries using the Axis 360 digital media library. Through the Axis 360 Marketing Support Website, you select and print marketing materials such as bookmarks, posters, Web ads and more to promote your Axis 360 service to patrons and the community. Axis 360 Marketing Support Website is a complimentary service that Baker & Taylor offers to libraries using the Axis 360 digital media library. Items available on Axis 360 Marketing Support Website: • Press Release – announce the addition of Axis 360 to your library • Web ads – to post on your website and to use in email communications Social Media ads • Bookmarks • Posters • Shelf Talkers Consortium co-branding can be provided for marketing asset templates. Resources available on Axis 360 Marketing Support Website: • Videos • How-to and help documentation

RECORDED BOOKS: We have a full selection of marketing tools available for download from our website including posters, bookmarks, fliers, and shelf talkers.

Mackin gives you the tools to effectively promote digital titles and MackinVIA to your patrons. We provide a variety of promotional materials for download on Mackin.com, including MackinVIA posters, table tents, eBook stickers, and bookmarks. Ebook shelf markers are an easy way to alert patrons that a print book is also available in digital format. Ebook shelf markers may be downloaded from Mackin.com or purchased from Mackin according the following fee structure: 1-249 markers, \$1.75 each; 250–499, \$1.25 each; 500 or more, please call for a custom quote.

OverDrive provides marketing and outreach materials for all libraries at the OverDrive Partner Portal- Marketing and Outreach section (<http://partners.overdrive.com/marketing-outreach/>). This includes marketing kits, press release templates, best practices, templates for bookmarks, posters and fliers. Additional marketing material can also be created upon request and cost will be based on production costs incurred.

#### **4.5 What means of technical support are available at no additional cost to participating library staff?**

Baker & Taylor offers several support options for our Library customers. Library staff may access our online Help, 24/7. Direct, toll-free phone customer service is provided, with work day hours Monday – Friday (8:00 am to 6:00 pm EST). E-Mail support is available Monday-Friday (8:00 am to 10:00 pm EST). E-Mail support for urgent issues is available Saturday/Sunday (1:00 pm to 5:00 pm EST). Toll Free Telephone: 800-775-3700 E-Mail: [axis360support@baker-taylor.com](mailto:axis360support@baker-taylor.com)

RECORDED BOOKS: We have a technical support team that is available to assist with any problems the library staff and end users might have. Support is available by email 24 hours a day seven days a week. Toll-free phone support is available Monday-Friday from 8:30am-6:30pm EST.

Mackin: We value our customers and their time, which is why a real person always answers the phone – 24 hours a day, 7 days a week. Customer Service is available by phone toll-free: 800-245-9540, email: [customerservicedept@mackin.com](mailto:customerservicedept@mackin.com), or through online LiveChat at [Mackin.com](http://Mackin.com), 7:30am – 5:00pm CST, Monday-Friday. Mackin also provides online help guides and video tutorials for quick troubleshooting. Mackin can also assist with initial user account setup and the migration of a library's current digital content into MackinVIA.

OverDrive provides ample training for the participating library to provide the first response for support inquiries. In the event of additional questions, support questions can be submitted by the library in their OverDrive Marketplace account for a quick response from the OverDrive Support team. Administrators can also contact their OverDrive Account Specialist and receive quick responses for technical questions related to the library website and other technical matters.

#### **4.6 What means of technical support are available at no additional cost to registered end-users?**

Baker & Taylor Technical Support staff are available by phone, chat and email to assist library staff with all issues that cannot be resolved at the library. In addition, Axis 360 library patrons will have direct access to training and information materials including, How To documents per specific reader, device and operating system, our interactive Online Help portal including FAQs, articles and searchable answers, and YouTube instructional videos per reader, device and operation system.

RECORDED BOOKS: We provide onsite and offsite training for staff and the public depending on the needs of both. We offer online training via webinar, or live onsite at no charge.

Mackin has earned the reputation for exceptional customer support. Mackin's customer service department is pleased to assist at any time and is available by phone, online chat or email. All phone calls are answered by live people. After business hours, an answering service ensures your message is delivered to our customer service department immediately the next business morning. Mackin also provides online help guides and video tutorials.

OverDrive offers free technical support to end users via the OverDrive Help page <http://help.overdrive.com/>, where users can see step-by-step videos of how to access the service depending upon their device and the format they want to use, as well as answer hundreds of other

questions the user may have on the service. The Help website is updated frequently for new devices and technology updates to the OverDrive sites.

#### **4.7 What functionality is available to participating library staff through the administrative module or website?**

BAKER & TAYLOR: The Axis 360 Administration site provides self-service access to a full suite of collection management tools, statistics and reporting, and user account management tools including barcode editing and holds queue controls. The Axis 360 Library Administration website offers 17 different reports in list and graph formats including: inventory, circulation, holds, and users. Reports can be customized to show totals, specific date ranges, segmented subjects, segmented audiences, segmented formats, etc.

RECORDED BOOKS: The Library Administrative site allows for users to purchase content, run reports and statistics. Library administrative site also provides direct communication banners.

Mackin: A full administrator can manage all the settings, titles, groups, patrons and reports in the MackinVIA account. A full administrator can give permission to personnel to operate as group managers. A group manager has the ability to create groups and manage the titles within those groups. Resource groups are advantageous for creating collections of eResources for specific patron groups or special library initiatives/projects. The number of groups is unlimited. Administrators also have options for customizing homepage layout, available search parameters, categories, dictionary options, and checkout/requests limits, activation/deactivation of eResources, and other options. MackinVIA provides detailed usage reports through the administrator access. Parameters include groups, categories, date of usage and resource type (eBooks, databases, audio books or videos). Reports can be exported to Excel format for further analysis by clicking the "Export All" link at the top right of the report page. Custom reports are available by contacting Mackin. MackinVIA's new "Add/Edit" feature allows MackinVIA administrators to add/upload their web-based content to MackinVIA and to populate the resource description fields for easy discoverability by patron searches. Lastly, circulation features allow administrators to see who currently has books checked out, requested or held (those can actually be cancelled) as well as online reads.

The OverDrive Marketplace is a role-based access system, where the primary administrators can choose the roles that each user can have within the system. This includes rights such as: catalog viewing, cart creation, report capabilities, purchasing, full admin rights, support ticketing, etc. These can be strictly defined by the participating libraries to ensure only authorized users are able to access certain features of the administrative portal in OverDrive Marketplace.

#### **4.8 Does the respondent provide invoicing capability to the consortium administrator in order to assign costs to participating libraries locally? Please describe this process and any fees associated with this service.**

BAKER & TAYLOR: The consortium administrator will have access to on-demand reporting from Axis 360 to determine usage at the individual member level as well as consortium wide. This data can be used to apportion costs to member libraries based on usage of the shared services. The consortium will receive a single invoice annually from Baker & Taylor for hosting, access and services fees.

RECORDED BOOKS: No

Mackin may be able to provide a free order management system to assist with invoicing needs.

Yes, OverDrive offers flexible invoicing procedures and will work with the consortium administrator to provide the invoices needed to assign costs appropriately. There is no additional fee for this service.

**5.1 What means of generating statistical reports are available to participating libraries? Reports must be made available for each individual library as well as cumulatively, and must include the following data:**

- **Circulation**
- **New patron registration**
- **Collection usage**
- **Website analytics**
- **Total number of checkouts per format**
- **List of titles viewed**

BAKER & TAYLOR: The Axis 360 product includes a Library Administrative module which allows participating agencies to produce reports detailing holds statistics, circulation statistics, inventory circulation figures by month, inventory, total users, new users, and a report of user/patron posted reviews. Graphs may be produced, displaying the top ten circulating subjects. These reports may be exported in a variety of formats, including XML, CSV, and PDF, MHTML, and Excel, TIFF file or Word. The User may choose to scale the data within the report by choosing the start date and ending date of the reporting period, the material format in which they are interested, and subject headings. Report elements include: ISBN, Title, Author, BISAC subject description, Publisher, Material Format, Total Circulations, Current Circulations, Quantity Owned, Date Added to Collection, Current Holds, and Number of Patron Reviews. The Library may export the report identifying only the variables and statistics they wish to use.

RECORDED BOOKS: OneClickdigital, IndieFlix, and Comics Plus reports can be run and viewed online, as well as exported to spreadsheets. Zinio reports can be exported as .CSV or .PDF formats.

MackinVIA provides detailed usage reports through the administrator access at any time. Parameters include groups, categories, date of usage and resource type. Reports present the resource's title, date added to MackinVIA, active/inactive status, author, publisher, and number of views, checkouts and requests. New patron registrations and website analytics reports are not currently available.

OverDrive: These reports can all be easily generated in real time 24/7/365 within the OverDrive Marketplace by authorized administrative users.

## **5.2 In what format are reports available?**

BAKER & TAYLOR: These reports may be exported in a variety of formats, including XML, CSV, and PDF, MHTML, and Excel, TIFF file or Word. The User may choose to scale the data within the report by choosing the start date and ending date of the reporting period, the material format in which they are interested, and subject headings. Report elements include: ISBN, Title, Author, BISAC subject description, Publisher, Material Format, Total Circulations, Current Circulations, Quantity Owned, Date Added to Collection, Current Holds, and Number of Patron Reviews. The Library may export the report identifying only the variables and statistics they wish to use.

RECORDED BOOKS: Reports can be exported to excel. Zinio reports can be exported as .CSV or .PDF formats.

Mackin: Reports may be exported into Excel. Custom reports may be available in other formats by contacting Mackin.

The reports are available for viewing within the OverDrive Marketplace and can be exported in Excel format.

## **5.3 How does respondent ensure that generated reports protect patron privacy?**

BAKER & TAYLOR: Reports generated provide statistics on the system and system usage, but do not contain personally identifiable information on individual patrons.

RECORDED BOOKS: All user information is encrypted in secured URLs.

Mackin: Our reports do not share user information, only title level statistics.

OverDrive: The reports generated are created by the library or administrative staff and are not produced in such a way to violate patron privacy.

## **6.1 What is the cost for adding or removing participating libraries?**

BAKER & TAYLOR: Generally, there is no fee associated with adding or removing member libraries. Annual hosting fees may increase or decrease based upon the changes in the overall size of the user base. Please see item 1.7 for details.

RECORDED BOOKS: There is no cost for adding or removing libraries.

Mackin: We only charge for the digital resources (the content) that each library purchases. There is no charge for the platform, and there is no charge for setting up or removing a library's access to the platform.

OverDrive: There is no cost for removing participating libraries. The cost for adding libraries will depend upon the contract agreed upon between OverDrive and the State.

**6.2 Respondent must describe in detail all one-time costs and ongoing annual costs of this service for the consortium.**

BAKER & TAYLOR: There are no one-time or start-up costs. Fees associated with hosting (annual fee) and e-content purchase are described in item 1.7.

RECORDED BOOKS: Zinio for Libraries - Only Annual Subscription for Collection Site and Content  
OneClickDigital - Only Annual Subscription for Collection Site and Content •IndieFlix - Only Annual Subscription to set all-access content  
ComicsPlus - Only Annual Subscription to set all-access content

MackinVIA, implementation services and as-needed training webinars are all free services. The purchasing party will only be charged for content.

OverDrive: The cost will be dependent upon the type of consortium and services requested.

**6.3 Respondent must describe the basis on which any hosting fees or other flat fees are calculated.**

BAKER & TAYLOR: The Annual Hosting, Access and Services Fee is determined by the number of institutions participating in the services and the number of transactions supported.

RECORDED BOOKS: Zinio for Libraries - Only Annual Subscription for Collection Site and Content  
OneClickDigital - Only Annual Subscription for Collection Site and Content •IndieFlix - Only Annual Subscription to set all-access content  
ComicsPlus - Only Annual Subscription to set all-access content

MackinVIA is a free service, allowing you to allocate resources solely to content. Digital content exists in a variety in licensing options and therefore, in a variety of price points. Standard Mackin pricing is up to 45% off publisher list price.

OverDrive charges hosting fees to cover operational costs such as hosting, service and format upgrades, training services, app upgrades, DRM, bandwidth, secondary support, collection development support, marketing assistance, etc. for the digital collection.

**6.4 Respondent must clearly identify any costs associated with normal use of their e-content services, beyond the hosting fee, if any, and content licensing or purchases.**

BAKER & TAYLOR: Econtent selections are invoiced at publishers' list prices for libraries. From time to time, Axis 360 is able to offer publisher promotions that may reduce the cost of content below list

prices. Hosting, Access and Services fees are described in item 1.7, above. There are no other costs related to Axis 360 services.

RECORDED BOOKS: See 6.3

Mackin: No additional fees are incurred with normal use of our services, with content licensing or with purchases.

OverDrive: The cost of content and the hosting fees are typically the only fees associated with the service.

**8.1 Provide the pricing for each of the services referenced in your response. This pricing should include the monthly recurring charges, any non-recurring charges, and any maintenance costs, and upgrade costs.**

**This pricing should also include hourly rates for customization and prerequisite software and hardware pricing.**

Annual hosting fees and costs associated with e-content purchasing are outlined in item 1.7. Standard MARC is available free of charge. Fees for customization of records will vary based upon the level of customization desired. There are no other costs related to Axis 360 services.

Pricing is as stated in question 1.7. OneClickDigital can incur additional costs the the library decides to purchase extra content outside of the core collections offered. All costs are for annual subscriptions.

MackinVIA is a free service with your first purchase of digital content from Mackin and does not entail any additional charges, maintenance costs or upgrade costs. Customers are only charged for content, with standard pricing at Mackin.com reflecting up to 45% off publisher list prices.

OverDrive: There would be annual, quarterly, or monthly hosting fees (whichever invoicing method is preferred by consortium). There would also be cost of content purchased by the consortium. There are no other recurring charges, and any future upgrades to the platform are included in the cost of the hosting fees and they are not raised or assessed one-time costs to enjoy the benefits of those upgrades.