EBSCO

Montana State Library

LIB-RFI-2020-0021

Downloadable and Streaming E-Content Services for Libraries

November 8, 2019   Original

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Cara Orban
State of Montana
Mitchell Building, Room 165
P.O. Box 200135
Helena, Montana 59620-0135

RE: LIB-RFI-2020-0021, Downloadable and Streaming E-Content Services for Libraries

Dear Ms. Orban:

Thank you for the opportunity to respond to the Montana State Library's request for information on downloadable and streaming e-content services. In response to the library's interest, we are pleased to present *EBSCO eBooks* subscription collections and *Flipster* digital magazines.

The best-selling *EBSCO eBooks* and *Flipster* solutions offer rich and varied collections of popular e-content, across audience levels and library types, and in user-friendly, portable formats. Combining large selections of titles with feature-rich platforms and cost-effective business models, the MSL could easily meet user content needs, optimize collection development, streamline library workflows and increase usage – all on a maximized budget.

As you read through the following details, your EBSCO representative will be available to assist with any questions or requests for additional information:

> **Kevin Leffew**
> *Vice President of Field Sales*
> (800) 653-2726 x2146
> kleffew@ebsco.com

We look forward to speaking with you and thank you again for your kind consideration.

Best regards,

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EBSCO Founders' Club
David Walker
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EXECUTIVE SUMMARY

EBSCO thanks the Montana State Library (MSL) for the opportunity to respond to this request for information. It is our understanding that the State is interested in cost-effective solutions for collection development, which can meet diverse content, coverage, format and accessibility needs. As the leading provider of content and technology for libraries worldwide, EBSCO is proud to offer a variety of quality e-content services, made accessible through easy-to-use interfaces, and of value to patrons across age ranges, interests and backgrounds. With the current offer, EBSCO aims to provide MSL with the ultimate digital content and services, on behalf of libraries and end users across the consortium.

EBSCO's Offer

In response to the State's request, EBSCO is pleased to present information on *EBSCO eBooks* subscription collections and *Flipster* digital magazines. As a tradition at EBSCO, we work to provide end users with the highest quality e-content and to optimize the acquisition process for libraries. In continuation of this tradition, our offer encompasses an unparalleled collection of materials and digital library services. Combining our wide selection of content with intuitive interfaces, simple options for subscription and streamlined acquisition – EBSCO provides the ultimate service for building, maintaining and expanding your library collection.

Comprising a variety of formats and options, key features of this offer include the following:

- The *EBSCO eBooks* collection currently offers more than 1.5 million titles from over 1,500 leading publishers. This coverage encompasses a growing selection of best-selling, front-list and award-winning content, as well as classic backlist favorites. It also represents the widest range of genres, subjects and specialty areas, both fiction and non-fiction. For optimal cost-value, thousands of titles are packaged into subscription collections. As part of this proposal, EBSCO is pleased to offer the following selection, presented as a bundle:

  - The eBook Academic Collection
  - The eBook Community College Collection
  - The eBook High School Collection
  - The eBook K-8 Collection
  - The eBook Public Library Collection

  Each collection includes a wide selection of e-books, with titles hand-selected for their market relevance, subject coverage and value. As a supplement, individual libraries may also purchase e-book and audiobook titles individually — from the full collection — based on unique preferences and needs.

- Through *Flipster*, EBSCO provides subscription access to current and back issues for nearly 1,500 digital magazines, with new selections added monthly. This includes many that are uniquely available through EBSCO's platform, from hundreds of high-profile publishers. With high user limits per title (including unlimited access) and options for both online/offline reading, the library can ensure anytime, anywhere access to users' favorite titles. As part of this offer, EBSCO is also pleased the present the MSL with advanced cost savings, with a **50%** discount on *Flipster* titles.

Overall, benefits for libraries and end users include:

- Content for both leisure and learning, geared towards users of all ages
- High-quality publisher and partner representation, popular across libraries and audience levels
- Easy access in-library, at home and on-the-go, with options for online and offline reading
- Intuitive user and administrator interfaces, designed for accessibility and ease-of-use
- Enhanced interface appearance, interactive features and robust functionality
- Cost-effective acquisition options, with alternative licensing models available
- Hand-curated collections and complimentary collection development support
- No hosting, platform, access or delivery fees, and no mark-ups on publisher price
- Easy integration with existing library and discovery systems, with complimentary MARCs
- Valuable usage and collection development reports, available on demand
- Streamlined purchasing via dedicated sales representative and online catalog
- No-cost implementation, training and marketing support services, available ongoing
- Advanced technical support for both end users and administrators, available 24/7/365

As a result, through EBSCO, Montana State Library could easily:

- ✓ Meet various library resource needs and end user interests
- ✓ Optimize library collection development and acquisition
- ✓ Streamline purchasing and administrative workflows
- ✓ Increase digital usage with high-circulating, in-demand resources
- ✓ Create a sustainable, fresh collection on a maximized budget

Acquisition and Usage Models

EBSCO offers a variety of acquisition models and purchase methods to meet various collection development and budget considerations. To best meet MSL interests, as outlined in the request for information, EBSCO proposes the following:

o *EBSCO eBooks* **– Subscription Collections** – To meet the collection development needs of individual libraries, *EBSCO eBooks* subscription collections contain large selections of market-oriented titles across various subject areas, complementing any library collection. Packages are offered as an annual subscription, with unlimited simultaneous user access for all titles. In addition, titles are added to each package throughout the year and MARC records are provided, all at no additional charge.

   EBSCO eBooks subscription collections present significant cost savings, as they can be purchased at the consortium level and shared throughout the state. As noted above, *EBSCO eBooks* and *EBSCO Audiobooks* are also available for purchase and ownership at the individual title level. Titles can be purchased individually to supplement a shared statewide subscription, *on a per library basis*. This includes more than 190,000 DRM-free e-book titles, with no checkout, download or other restrictions. The most common user models include: 1-book, 1-user; 1-book, 3-users; and 1-book, unlimited-users.

o *Flipster* **– Digital Magazine Subscriptions** – *Flipster* subscriptions are offered on an annual, title-level basis (which can be 1 or 2 years, depending on the publication). Usage models per title are predetermined by the publisher, ranging from 20 to 5,000 and unlimited simultaneous users (per issue).

However, the vast majority are offered on an unlimited basis. Individual title pricing is further based on population size, allowing for fair and equal pricing across libraries.

Currently, *Flipster* subscriptions can be purchased at the consortium level at a **50%** discount, for use across all *public libraries* in the state. As with above, individual titles can also be subscribed *on a per library basis*, both within the public library and additional market spaces.

It is also important to note, regardless of acquisition model and format, that EBSCO has no platform, hosting, access or delivery fees. As a result, libraries can place more focus on content, rather than budget.

Additional information on purchasing and the above models can be found in **Attachment 1.5 Estimated Price Range**.

End User Platforms

EBSCO eBooks and ***Flipster* digital magazines** can be made available to end users separately, via dedicated EBSCO interfaces. For streamlined access, many titles can also be accessed via the traditional EBSCO*host* platform and *Explora* – EBSCO's interface designed specifically for public library and K-12 end users. Regardless of platform, users can easily browse, search, read, checkout and download titles offline, as well as use a range of enhancement features.

Benefits of the platforms for libraries and end users include:

- o Options for on-site, remote and mobile access, with convenient responsive design
- o Compatibility with any internet-connected device, for easy access in-library, at home and on-the-go
- o Intuitive basic and advanced search options, supporting general or specific needs
- o Convenient search alerts, search history and RSS feed settings
- o Detailed author, publisher and descriptive information for every title
- o Synced access to user checkouts across devices, via personal login
- o Personal folder options enable placing holds, saving lists and organizing favorite books
- o Ability to create and share notes, chapters, permalinks to full text, social media posts and more
- o Interactive dictionary and search within full-text features, with linked, highlighted results
- o Instant citation, with export available to popular bibliographic software
- o Ability to print, email and save PDF versions of full-text content
- o Offline download in as little as three clicks, for maximized portability and convenience
- o Automatic check-ins mean titles are never returned past due
- o No limits on the amount of times a title can be checked out
- o Adjustable font size/zooming options, for a customized reading experience
- o Advanced multilingual support, with both global content and interface translation

Value-Added Services

In addition to the high-quality content and features of the offered products, EBSCO also offers the following value-added benefits of partnership, all at no additional charge:

- ✓ Enhanced accessibility – EBSCO's easy-to-use interfaces are convenient for all types of users
- ✓ Complimentary marketing support and custom promotional materials

- ✓ Industry-leading customer service, with more than 95% customer satisfaction
- ✓ Decades of experience, a history of financial strength and a commitment to customers
- ✓ Dedicated project management for initial and ongoing contract maintenance
- ✓ No-cost customized training plans and on-demand training resources readily available
- ✓ Seamless implementation for new and existing customers, with no interruption
- ✓ Interface branding options available at the individual and library system levels
- ✓ Easy MARC record integration with library catalogs and discovery services, regardless of ILS
- ✓ Intuitive, efficient administrative modules, for easy collection and platform maintenance
- ✓ 24-hour-a-day, 365-day-a-year availability, with a guaranteed uptime of 99.9%

Summary

In all EBSCO does, we strive to be a partner with libraries. In partnership with the MSL, EBSCO extends our commitment to libraries and end users across the state. As a company and as individuals working to support this project, EBSCO would be dedicated to helping the State best serve its libraries and citizens, with the highest quality e-content for their recreation, reference and research.

EBSCO Response

Content Requirements

1. **What formats does the respondent provide for purchasing or licensing content?**

   To meet the Montana State Library's primary interest in multi-library e-content services, EBSCO is pleased to present a primary offer of e-book and digital magazine subscriptions. These are made available through the best-selling **EBSCO eBooks** and **Flipster** solutions. Throughout this response, EBSCO has provided answers per format, as applicable. Additional information regarding purchasing and acquisition models can be found at the **end of this document** and within **Attachment 1.5 – Estimated Price Range**.

2. **What file types does the respondent provide for each format? Does the respondent provide content compatible for all major device platforms (Kindle, IOS, Android, Windows…)?**

   EBSCO eBooks
   EBSCO eBooks provides books in two formats: PDF and EPUB. Many books are available in both formats, while others are available only in one. EBSCO works closely with publishers to encourage both.

   Regardless of format, e-books are delivered to end users via EBSCO's web-based, hosted platforms. These can be accessed through any internet-connected device, including computers, tablets and smartphones, using any common web browser.

   In addition to reading in-browser, many titles can be downloaded offline, though some devices and file formats may require use of a reader app and/or support for Adobe DRM software. As described in response to the **Technical Requirements, Question 11**, supported readers commonly include iOS, Android, Sony eReader Touch Edition, Barnes & Noble Nook and all readers supporting Adobe DRM software.

   Users can also read using Kindle for the Chrome browser, and should be able to download an e-book to Kindle Fire in full using the *Mantano Reader Premium* app or the *OverDrive* app. Alternatively, using Amazon's *Send to Kindle* options, users can send saved e-book pages in PDF format to any Kindle eReader device or Kindle app on iPhone or Android devices.

   Flipster
   All *Flipster* titles are available in PDF format. Each issue is a complete replica of its print version, including all graphics and images, advertisements and articles. Issues are available for reading in their entirety, allowing users to casually "flip" from cover to cover.

   All magazines are available for online reading in-browser; they can be accessed online via a browser-based interface. The majority of titles can also be checked out and downloaded offline to the *Flipster* app, allowing for easy portability and access, virtually anytime, anywhere. The *Flipster* app is currently available for iOS, Android and Kindle Fire devices. It can be freely download at any time, from the App Store (iOS), Google Play (Android) and Amazon Store (Kindle Fire).

3. What are the available consortia pricing models and fee schedules for these formats?

Consortia sharing is currently available through EBSCO's subscription model, available for both e-book and digital magazine formats. Subscription pricing is an annual, all-inclusive charge, with no additional costs for training, technical support or user support. Quotes are based on library type(s) and population size(s), allowing for fair and equal pricing. Additional financial advantages of the EBSCO model also include:

- ✓ No Platform Fees
- ✓ No Hosting Fees
- ✓ No Access Fees
- ✓ No Delivery Fees
- ✓ Complimentary MARC records

For unique detail on pricing models per format, please see the below:

EBSCO eBooks
For Montana State Library, *EBSCO eBooks* subscription collections present significant cost savings, as 1) they can be purchased at the consortium level and accessed throughout the state, and 2) EBSCO is pleased to offer several subscriptions as a value-added bundle.

EBSCO eBooks subscription collections are offered as an annual subscription, with unlimited simultaneous user access for all titles. In addition, titles are added to each package throughout the year and MARC records are provided at no additional charge.

Overall benefits of a subscription include:

- ✓ The ability to offer large amounts of useful material in a cost-effective way;
- ✓ Availability on an annual basis, for easy budget and resource planning;
- ✓ Unlimited simultaneous user access for all titles;
- ✓ Quarterly additions, for consistently fresh content; and
- ✓ Pricing at a fraction of the cost of purchase.

Flipster
Currently, *Flipster* subscriptions can be purchased at the consortium level and used across all public libraries only. Subscriptions are offered on an annual, title-level basis (which can be 1 or 2 years, depending on the publication). Usage models are predetermined by the publisher, ranging from 20 to 5,000 and unlimited simultaneous users (per issue). However, the vast majority of titles are offered on an unlimited basis.

The only cost in addition to content is a **5%** subscription service fee – an industry standard. Subscription start dates are also flexible and include the 1st day of the next three months.

4. **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.**

EBSCO eBooks
EBSCO eBooks subscription collections contain primarily backlist content; however, titles from recent publication years are included, up to the year preceding the current year (currently 2018). Please note, full descriptions and title lists with publication detail have been provided in response to **Question 6** below.

Additionally, it is important to note that the totality of the *EBSCO eBooks* collection encompasses more than 1.5 million titles and growing, with best-selling, front-list and award-winning content, as well as backlist staples. Books are added to each subscription collection several times per year.

Flipster
Through *Flipster*, EBSCO provides access to current and back issues for 1,500 digital titles, with new selections added monthly. This includes hundreds that are unique to EBSCO, and not available from any other digital newsstand. In growing this collection, EBSCO has partnered with more than 575 publishers from around the world, seeking to offer the in-demand titles that libraries and end users truly want.

Any current *Flipster* subscription will provide access to issues on track with their print release schedule. The *Flipster* catalog also includes issues back through 2014. Back issues are available from the point at which a publisher signs with EBSCO (e.g., if EBSCO signed a publisher in May 2015, back issues are available from May 2015 and forward). They are automatically included with any current subscription.

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

EBSCO eBooks
The *EBSCO eBooks* subscription bundle presents multidisciplinary coverage across relevant markets and subject areas. This includes titles from hundreds of top scholarly, trade, STM and reference publishers, as well as the most popular fiction and nonfiction houses. Featuring titles to meet all manner of research needs and personal interests, examples per collection include:

- eBook Academic Collection
    - Taylor & Francis
    - Brill Academic Publishers
    - Elsevier Ltd.
    - Cambridge University Press
    - Oxford University Press

- eBook Community College Collection
    - Cambridge University Press
    - University of California Press
    - Packt Publishing
    - Brill Academic Publishers
    - Wiley

- eBook High School Collection
    - Saddleback Educational
    - Orca Book Publishers
    - Twenty-First Century Books
    - Darby Creek
    - Carolrhoda Lab
    - Bloomsbury Academic
    - Andrews UK

- eBook K-8 Collection
    - Springer Publishing Company, Inc.
    - Oxford University Press
    - Brill Academic Publishers
    - Bloomsbury UK
    - Sage Publications

- eBook Public Library Collection
    - Abdo Publishing
    - Crabtree Publishing
    - Rourke Educational Media
    - Lerner Publications
    - Independent Publishers Group

Flipster

As previously noted, EBSCO has partnered with more than 575 publishers from around the world in gathering the *Flipster* collection. Appealing to both general and specific interests, this encompasses many high-profile, widely circulated publishers, as well as those who specialize in smaller, niche audiences.

Currently, the current top 10 U.S. publishers represented include:

- ✓ Consumer Reports
- ✓ Meredith Corporation
- ✓ Time USA LLC
- ✓ Bloomberg L.P.
- ✓ Conde Nast
- ✓ Scientific American
- ✓ Newsweek LLC
- ✓ Forbes Inc.
- ✓ Hearst Magazines
- ✓ National Geographic Partners LLC

Through our publisher relationships, EBSCO is able to provide access to current and back issues for over 1,500 digital titles, with new selections added monthly. Titles include many that are uniquely available through EBSCO's platform, from hundreds of high-profile publishers.

To continually enhance our selection of content, EBSCO actively seeks new publisher content, based on title popularity with EBSCO's print subscription division, circulation data and particular customer

requests. Most recently, EBSCO has emphasized the acquisition of licensed content from international (non-US) publishers. Through these efforts, EBSCO seeks to meet the needs of an increasingly global market.

6. **What broad subject categories does the respondent provide for e-content purchase?**

EBSCO eBooks
The offered e-book subscription collections contain large selections of market-oriented titles across various subject areas. This includes titles appropriate for various age groups, from introductory/basic texts to higher-level research materials. Currently, these subscription collections cover a broad range of topics in key subject areas, including:

- Art
- Accounting
- Biology
- Business strategy and management
- Computer science
- Crafts and hobbies
- Earth science
- Economics and finance
- Education
- Engineering
- General arts and humanities
- Health and fitness
- History
- Language arts and discipline

- Literature and literary criticism
- Marketing
- Mathematics
- Medical
- Physics
- Political science
- Psychology
- Religion
- Research skills
- Social science and cultural studies
- Sociology
- Technology
- And more

Full descriptions of each subscription have been included for your additional reference below:

eBook Academic Collection
Title List: https://www.ebscohost.com/assets-ebooks/title-lists/eBook_Academic_Collection_NA_All.xlsx

This growing subscription package contains a large selection of more than 180,000 multidisciplinary e-books representing a broad range of academic subjects. The breadth of information available through this package ensures that students and scholars will have access to information relevant to their research needs.

eBook Community College Collection
Title List: https://www.ebscohost.com/assets-ebooks/title-lists/eBook%20Community%20College%20Collection.xlsx

Focused on the academic and trade information needs of community colleges, this multidisciplinary collection contains nearly 60,000 e-books, including thousands of workforce development titles from notable publishers. The collection covers key subject areas including humanities, social sciences, business, science, technology and literary criticism.

eBook Public Library Collection
Title List: https://www.ebscohost.com/assets-ebooks/title-lists/PublicLibraryNA.xlsx

With more than 45,000 e-books chosen specifically for public libraries, this general reference collection features titles for both adults and juveniles, as well as best-selling and highly recommended titles from industry-leading publishers. A wide range of subjects and topics are covered to meet various patron needs, including substantial offerings in self-help, health and fitness, games, crafts and hobbies, medical, cooking and religion. The collection also features titles on recreation and leisure, geography, commerce, finance, family, marriage, women, folklore, social and public welfare, and home economics.

eBook High School Collection
Title List: https://www.ebscohost.com/assets-ebooks/title-lists/eBook_HighSchool_Collection.xlsx

Designed specifically for high school students and educators, this collection offers an easy, cost-effective way for libraries to provide full-text e-book coverage that aligns with their school's curricula, as well as complement other e-book and database resources from EBSCO. The package contains more than 11,000 e-books that support a quality learning experience across all academic subject areas, including history, language, literature, science and technology. Content includes a selection of classic literary works, important historical documents and general reference materials. The collection also features a selection of teacher resources to support educators and administrators. Titles align with Common Core Curriculum Standards (for participating U.S. states).

eBook K-8 Collection
Title List: https://www.ebscohost.com/assets-ebooks/title-lists/eBook_K8__Subscription.xlsx

This collection includes e-books for K-8 students and the educators who work with them. It offers a cost-effective way for libraries to provide educators with full-text e-book coverage to support their curricula, and is a great complement to other elementary and middle school e-book and database resources. The eBook K-8 Collection contains more than 15,000 titles chosen to support a quality learning experience for K-8 students across all subject areas taught in elementary and middle schools, and content aligns with Common Core Curriculum Standards (for participating U.S. states). The collection also features a selection of teacher resources to support educators and administrators.

Flipster
The overall *Flipster* collection covers a wide variety of categories and includes content appropriate for all ages – children, teens and adults. Appealing to both general and specific interests, it encompasses many high-profile, widely circulated titles, as well as those of interest to smaller audiences, such as hobby and enthusiast publications. Currently, major category coverage include:

- Academics
- Adult Coloring Books
- Art and Design
- Automotive
- Business
- Comics
- Consumer
- Entertainment

- Family and Kids
- Fitness and Health
- Food and Cooking
- History
- Hobbies, Interests and DIY
- Home and Garden
- Lifestyle
- Literary

- Men's Interest
- News and Politics
- Science and Technology
- Sports

- Teens
- Travel and Regional
- Women's Interest

7. Please describe how content is delivered to the consortium platform.

EBSCO provides libraries with simple and efficient acquisition and delivery. All content is delivered electronically and can be expected on-platform promptly, as outlined per format:

EBSCO eBooks
All *EBSCO eBooks* subscription collections can be ordered through your dedicated EBSCO representative. Once an order has been placed, it can be expected on-platform within 24-48 hours.

Flipster
Any *Flipster* subscriptions ordered are made available on-platform two weeks prior to the customer's chosen start date. Start dates include the 1st day of the next three months. However, if the subscription is set to start in less than two weeks, the library will receive access overnight.

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?

To announce and communicate important technical updates and general release information, EBSCO uses telephone, email and the web (EBSCO Connect). EBSCO customers can also sign up for EBSCO System Alerts to stay current with any technical items, including notice of interface upgrades and enhancements, scheduled system maintenance, service issues, updates and resolution.

EBSCO has an agile release process whereby interface and system improvements can be made on a rolling basis, as often as biweekly. These updates are performed by EBSCO developers and released simultaneously to all customers over the web. Most upgrades and enhancement releases process without any interruption of service, and the vast majority of these changes require little-to-no preparation or action on the part of libraries.

Regarding content updates, EBSCO also follows a regular update cycle and will communicate as outlined:

EBSCO eBooks
On average, EBSCO adds between 12,000-15,000 e-books to the overall collection monthly, growing our ability to meet the customized wants and needs of individual libraries.

For *EBSCO eBooks* subscription collections, titles are added, on average, each quarter (every 3 months), in January, April, July and October. When titles are added, a notification is sent via OCLC with an indication that the new MARC records are available for download. Notifications are also sent out via listserv, which the customer is added to upon subscription for collection maintenance.

Titles are removed from subscription collections twice per year, in January and July. It is important to note that EBSCO is the only aggregator who does not withdraw content year-round. Prior to titles being removed, customers are notified 3-6 weeks in advance to warn which titles will no longer be accessible.

This notification will include a title list in spreadsheet format. An additional notification is sent at the time the titles are removed.

Flipster
New issues available through your *Flipster* subscription are made available on-schedule and automatically added to your EBSCO instance. In the event a title becomes unavailable during your subscription period, EBSCO would be happy to discuss available options to remedy the situation.

As previously noted, EBSCO also seeks new publisher content and suggestions through several channels. On average, these efforts result in the addition of 20 titles monthly, ever expanding the collection and its amount of unique titles. EBSCO maintains an up-to-date title list of all titles at: http://flipster.ebsco.com/browse-magazines. This list is updated weekly.

9. **How will the respondent notify participating libraries of changes to licensing agreements and other use policies?**

Much like EBSCO's announcement and communication of important technical updates and general release information, any updates to licensing agreements and other use policies will be communicated via telephone, email and the web (EBSCO Connect). Major changes may also be communicated to you through your EBSCO representative.

For end users, updates or changes made to publisher licensing or permissions are also typically displayed on-platform.

10. **How are the customer's selectors notified about expiring materials?**

EBSCO eBooks
With *EBSCO eBooks* subscription collections, titles are removed only twice per year — as opposed to year-round with other aggregators — in January and July. Prior to titles being removed, customers are notified 3-6 weeks in advance to warn which titles will no longer be accessible. This notification will include a title list in spreadsheet format. An additional notification is sent at the time the titles are removed.

Flipster
Flipster subscriptions will be available throughout your chosen subscription period. If needed, EBSCO would be happy to work on a notification plan to alert the library of subscriptions nearing expiration. Notification would likely be direct from your EBSCO sales and/or customer service representative(s).

11. **How are expired materials removed from the collection?**

Expired materials are automatically removed from the platform by EBSCO. Although these materials are removed automatically, the library may need to manually delete MARC records from their catalogs afterwards.

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

   EBSCO eBooks
   When titles are removed in January or July, EBSCO seeks replacement content of a similar or higher relative value to ensure that the library's collection does not depreciate. While titles are only removed twice per year, titles are added, on average, each quarter (every 3 months), in January, April, July and October.

   Flipster
   Should a magazine become unavailable during the life of your subscription period, EBSCO would be happy to discuss available options to remedy the situation.

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

   EBSCO eBooks
   EBSCO eBooks subscription collections are provided with unlimited simultaneous user access for all titles; therefore, the need for additional copies is not necessary.

   Flipster
   The vast majority of *Flipster* titles are offered on a high-limit or unlimited user basis. If the title does happen to be at maximum capacity (of which there would be very few instances), users are notified and suggested similar titles.

   Flipster usage models are predetermined by the publisher, ranging from 20 to 5,000 and unlimited simultaneous users (per issue). The library may purchase additional subscription copies as needed to increase simultaneous usage; however, as the vast majority of titles are offered on an unlimited basis, the need for additional purchases is not frequent.

14. **How are titles added or made available in the consortium collection?**

   EBSCO eBooks
   For *EBSCO eBooks* subscription collections, titles will be added and made available in the consortium collection, on average, each quarter (3 months), in January, April, July and October. The addition is automatic. When titles are added, a notification is also sent via OCLC with an indication that the new MARC records are available for download.

   Flipster
   Flipster titles will be added to the collection on-demand, as they are ordered and purchased.

15. **How can titles be removed from the consortium collection?**

   EBSCO can assist in shadowing certain content from public view on request. To complete this, the library would need to identify which titles they would like restricted from public view and/or made available to a subset of the user population. Then, the library site would need to make a local collection with distinct profiles that separate the desired content from the main user base.

Please note that for *Flipster*, content can only be suppressed at the title level (not the article/issue level).

16. Can the consortium set a holds ratio for automatic purchase of additional copies as needed?

EBSCO eBooks
EBSCO eBooks subscription collections offer unlimited simultaneous user access for all titles; therefore, a holds ratio for automatic purchase is not applicable.

Flipster
At this time, *Flipster* does not offer a holds capability; therefore, there is no such mechanism. However, this functionality is not likely to be necessary, as the vast majority of titles are offered on a high-limit or unlimited user basis.

17. Please 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.

EBSCO eBooks
EBSCO supplies the latest editions of titles available in our collection. When a new edition of a title becomes subscription eligible, it is added to the subscription collection according to the standard schedule — titles are added to subscription collections each quarter and removed twice per year.

Please also note that "subscription eligible" date is not the same as "publication date" in all instances.

Flipster
EBSCO works with publisher partners to establish an appropriate *Flipster* posting schedule, in sync with dates of actual sale. *Flipster* does not typically experience lag-time between print/digital publication and availability on-platform. In the event of any lag time, EBSCO will work with the MSL to quickly resolve the issue.

18. What is the respondent's policy with regard to fair use?

Please note that EBSCO does not specifically restrict fair use; however, EBSCO does not have intellectual property rights to publisher content, other than the right to include that content in our collections. The intellectual property rights are controlled by the publisher. As such, users must abide by the Copyright Act of 1976, as well as any contractual restrictions, copyright restrictions or other restrictions provided by publishers, and specified with the product.

EBSCO provides access to content from a growing number of publishers, each of which has license limits on factors such as simultaneous users, interlibrary loan, course management systems, reserves and strategies for perpetual access and preservation. EBSCO has worked successfully with each to ensure the best possible terms for our current customers in individual libraries and consortia.

19. **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 and interoperability with platforms such as the Digital Public Library of America.**

EBSCO does not have any relevant collaborations to share at this time, but we are open to any initiative that would be mutually beneficial to our customers and business.

20. **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.**

EBSCO eBooks
EBSCO eBooks customers are entitled to free, full bibliographic records in MARC format. Pending library preference, these can be delivered in one of two ways:

1. Using OCLC's WorldShare Collection Manager. OCLC's WorldShare Collection Manager is a self-service tool that automatically delivers WorldCat MARC records for your materials. Libraries can set their delivery, customization and notification preferences, and can output new, update and delete records, so their collections, access URLs and title metadata always stay up to date.

2. Using EBSCO's rapid MARC delivery service. Institutions will receive MARC Records within minutes of an order; MARC record settings can also be managed using a new set of controls specific to *EBSCO eBooks* records. This service provides MARC Records for newly acquired titles, as well as custom requests for previously purchased titles. It does not provide deletion or updating of MARC Records, which means it complements the OCLC WorldShare Collection Manager workflow. Libraries can control their participation in the new service, choose their output and encoding formats and provide email addresses for receiving MARC record delivery notifications. *EBSCO eBooks* MARC record delivery service will offer libraries a choice of receiving MARC records in MARC-21 or MARCXML format, with MARC-8 or UTF-8 encoding. Files are delivered via email notification, which includes a link to directly access and download the MARC records. This link is valid for 7 days; in the event the URL is not used within 7 days, a new file can be requested with EBSCO's Technical Support team.

Regardless of preferred delivery method, OCLC will still be key in managing *EBSCO eBooks* MARC records, as OCLC will be the only system to provide updates to existing MARC records, MARC deletions for *EBSCO eBooks* subscriptions and customizations for your MARC records.

Once a MARC record is downloaded, it can be loaded into and accessed through the library's online catalog, regardless of ILS and discovery service, so long as it is compatible with ".mrc" files. Upon selection, the user is linked to the EBSCO platform, where authentication credentials are verified and he or she may continue on to read, check out and/or download the title.

Institutions can also customize some MARC records fields to fit their individual needs. For example, an institution can customize the 856 field if they wanted to add a proxy prefix, etc.

Flipster
Upon request, EBSCO can provide free MARC records for each magazine title purchased. Customers may request these records via web form at http://www.tfaforms.com/333633.

Once requested, the library will begin receiving MARC records each month, ensuring timely delivery. To ensure compliance with various library and international cataloging standards, these records are in MARC21 communications format. EBSCO can also offer various customizations and encourages libraries to send a sample MARC record for optimal service. As an example, the web form asks: *"Would you like to view the Customized 856 field and fixed field variables table to answer the fields below?"*

Once a MARC record is downloaded, it can be loaded into and accessed through the library's online catalog, regardless of ILS and discovery service, so long as it is compatible with ".mrc" files. Upon selection, the user is linked to the *Flipster* platform, where authentication credentials are verified, and he or she may continue on to view and/or open in-app.

21. **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).**

EBSCO eBooks
The bibliographic metadata, including names and subjects, for titles in EBSCO's e-book subscriptions are derived from their MARC records. The MARC record uses Library of Congress authorities that are then used for names and subjects. BISAC subject data is used to supplement Library of Congress subject headings.

Flipster
Subject indexing is not applicable to the *Flipster* collection. Each magazine is assigned a category at the outset of EBSCO's acquisition; relevant subject is typically clear and does not require authority controls to be applied.

22. **Please describe the features of the purchasing interface accessible to content selectors, including:**
    - **Search features**
    - **What inventory information is available**
    - **Holds information**
    - **Budget information**

A purchasing interface is not applicable for consortium-based collections.

EBSCO eBooks subscription collections are purchased on an annual basis and ordered with your EBSCO sales representative. (When ordered by the Montana State Library, collections could be accessed across *all libraries* in the state).

Flipster subscriptions can be placed using a live pricing link (i.e., a web-based magazine list and interactive order form). Alternatively, subscriptions can be ordered personally with your EBSCO Sales representative. (When ordered by the Montana State Library, titles can be used across all *public libraries* in the state).

That being said, EBSCO understands that individual libraries may like to supplement the collections they have access to through the state. To accommodate this need, individual libraries may also purchase e-book, audiobook and digital magazine content separately — selecting titles from the full collection — based on their unique preferences and needs.

EBSCO*host Collection Manager* (ECM) is currently offered as the online ordering portal and catalog for individual library purchase, across content formats. Through ECM, EBSCO offers a range of collection development tools to help libraries in the acquisition and expansion of their digital collections.

Although heavily stocked, ECM is an easy-to-use tool, with intuitive navigation and efficient searching, for an enjoyable selection process. Similar to EBSCO's end user platforms, it offers basic and advanced search options, as well as extensive browsing capabilities. Once a search has been entered, a Results List is presented with information on each applicable record, including pricing, publication and usage model detail.

For both catalogs, ECM also has the ability to filter out titles that are already owned or subscribed to by the site using a simple filter. Furthermore, they are presented with access to "My Owned Titles" and "*Flipster* Subscription Reports" for easy stock monitoring and management.

Once the administrator has located a title of interest, it can be easily added to the Shopping Cart for purchasing consideration; this option is available from both the Results List and the detailed record view. Regardless of whether purchasing *EBSCO eBooks*, *EBSCO Audiobooks* and/or *Flipster* titles, all purchasing is completed in one, universal Shopping Cart.

Overall, benefits of ECM include:

- ✓ Easy ordering and fast delivery of titles to end users
- ✓ Designated Selector and Approver accounts, to separate subject matter experts and buyers
- ✓ The ability to explore titles with basic or detailed searches
- ✓ Browse by category, pre-made collection, recently added and more
- ✓ The ability to sort results by relevance, publisher, price, etc.
- ✓ Convenient reporting capabilities and stock management options
- ✓ Simple payment and shopping tools for easy collection development
- ✓ Detailed bibliographic information and samples for each available title
- ✓ Helpful alerts that can be used to notify users of new content matching their criteria

End-user Service Requirements

1. **Can registered end-users place holds on titles? If so, what options does the respondent provide to notify patrons when holds are cancelled or expired?**

EBSCO eBooks
EBSCO eBooks subscription collections offer unlimited simultaneous user access for all titles; therefore, holds are not necessary or applicable.

Flipster
At this time, *Flipster* does not offer a holds capability. However, this functionality is not likely to be necessary, as the vast majority of titles are offered on a high-limit or unlimited user basis (per issue). If

an issue does happen to be at maximum capacity (of which there are very few instances), users are notified and suggested similar titles.

2. **What methods/support does the respondent provide for merging accounts or changing hold information when/if a patron card number has changed?**

The EBSCO Merge Accounts feature allows users to merge account information (saved titles, searches, alerts, etc.) from one personal user account (My EBSCO*host*) into another. Once the accounts are merged, the account that was depleted is removed and no longer exists on the service. Personal accounts can easily be merged by the end user on-platform, as needed and as available.

Editing of Personal User Accounts is also available in EBSCO*admin*. If Personal User Accounts have been set up, they can be adjusted by administrators at any time.

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

EBSCO eBooks
EBSCO welcomes all titles suggestions and encourages customers to share these directly with their EBSCO representative, via phone or email.

Additionally, EBSCO presents on-platform channels for end users to communicate recommendations directly with their library. For example, an "Ask-a-Librarian" tab can be enabled on-platform. The tab can be used to connect customers with their librarian via email, or it can direct the user to any URL of the library's choice (e.g., a web-form for suggestions).

For customers using *EBSCO Discovery Service* (EDS), a "Recommend to Purchase" tab can also be added to the user platform, through which end users can search the full *EBSCO eBooks* metadata to recommend titles of interest.

Flipster
EBSCO continually seeks to enhance our selection of *Flipster* content, utilizing several channels for suggestions and recommendations (both internal and external). For example, through an interactive feature on the *Flipster* website, library administrators and patrons can suggest new titles for inclusion. Once a title is suggested, EBSCO actively works on trying to obtain it.

At this time, however, end user suggestions to the library are not available directly on-platform for library review.

4. **Does the process allow the consortium to place limits on the number of recommendations each end-user can make per month?**

Please refer to the above response; there are no limits on the amount of titles that can be suggested through these channels.

5. **Can respondent offer the following capabilities through its end-user interface?**

    a. **Browse contents by genre and format;**

        EBSCO eBooks
        Upon platform access, users are greeted with several options for browsing and searching available content, including basic and advanced search options, the ability to browse by category (i.e., genre), and visual carousels of highlighted and featured titles.

        Users can also limit keyword searches to a particular indexed field for targeted browsing, using the drop-down menu alongside the search bar. Using indexed fields, users can create a search focused in any the following areas: All Text Fields, Title, Author, **Category**, **Subject**, ISBN, Publisher and Year of Publication. Additional field codes may also be applied manually, pending availability in the metadata (e.g., Lexile level – LX). When searching for *EBSCO eBooks*, searches can also be limited to a specific format by including one of the following in the Find field:

        - eBooks in ePUB format: FM EK
        - eBooks in PDF format: FM EB

        Flipster
        As with *EBSCO eBooks,* upon platform access, users are greeted with several options for browsing and searching magazines, including basic and advanced search options, the ability to browse by language and category, and visual carousels of latest and featured issues. These carousels allow libraries to highlight new and popular issues, and the highlighted categories facilitate easy browsing of content by interest.

        Regarding search capabilities for targeted browsing, the most basic form of searching is by keyword, which is conducted through a simple search box that features a clean, intuitive layout, similar to popular search engines encountered across the web. Search terms can be any relevant keyword, be it a specific magazine title, subject of interest or other.

        All titles available through *Flipster* are available in PDF format; therefore, it is not necessary to browse titles by format.

    b. **Search, browse, and access content through interface appropriately responsive to browser or mobile device;**

        EBSCO eBooks
        As part of our commitment to continuous improvement, EBSCO has revamped mobile support for our online interfaces. The *EBSCO eBooks* online platform is now fully responsive, and can accommodate any screen size, allowing for access to full features and functionality on any device. Users may search, browse and access titles from any device without the fear of broken or lost content.

        Additionally, EBSCO has enhanced e-book modals to streamline the download process. Upon download, the e-book viewer will detect the device and prompt use of a compatible app. *EBSCO eBooks* features may differ depending on which reader app is downloaded.

Flipster

The browser-based *Flipster* product is not fully responsive at this time; however, the Full Text Viewer does feature responsive design properties, allowing for ease-of-access on a variety of devices and screen sizes. Alternatively, the *Flipster* mobile app is fully responsive. It supports the full, end-to-end *Flipster* experience and is the recommended workflow for end users.

c. **Filter results through several optional limiters, including availability, subject, and Lexile Measure**

EBSCO eBooks

Through the *EBSCO eBooks* advanced search function, users can filter results using an array of limiters, which allow the user to refine results both pre- and post-search. Limiters are easily customizable, and include:

- Author
- Category
- Subject
- Language
- Publication Date
- Publisher
- Title
- ISBN
- Download Available

As previously noted, users can also limit keyword searches to a particular indexed field by selecting a field from the drop-down menu alongside the search bar. Using these indexed fields, users can create a search focused in any the following areas: All Text Fields, Title, Author, Category, Subject, ISBN, Publisher and Year of Publication. Additional field codes may also be applied manually, pending availability in the metadata (e.g., Lexile level – LX).

As all titles are available on an unlimited basis in *EBSCO eBooks* subscriptions, an availability limiter would not be necessary or applicable.

Flipster

Through the Advanced Search, *Flipster* users have access to several added search options, including choice of search modes, expanders and limiters/filters, such as Magazine Title, ISSN and Publisher. Users can also restrict keyword searches to a particular field within the index, using a drop-down menu of codes alongside the search bar. Indexed field searches can be issued in any of the following areas: All Text, Title, Category, ISSN and/or Publisher. They can also be combined with Boolean operators for a more targeted query.

As most *Flipster* titles are available on a high-limit or unlimited user basis, an availability limiter would not be necessary or applicable.

6. How does the respondent protect patron privacy?

The privacy and security of data that relates to customers is of the utmost importance, and EBSCO acknowledges and values the trust and confidence that customers have placed in us with respect to personal information. The EBSCO Products and Services Privacy Policy is posted on each page of the EBSCO.com website (www.ebsco.com), the EBSCO login page, as well as on every page of the user interface (https://www.ebsco.com/company/privacy-policy).

Users of EBSCO products are not typically known to EBSCO as individuals. EBSCO will only collect and use personal information when a user voluntarily provides it to EBSCO or when an institution or entity customer provides it in connection with its method of authenticating users for access to products, with the exception of an institution's IP address, which may be automatically captured when a user accesses a product. Also, to use some features of EBSCO products or to undertake certain actions, a user must first complete a registration form or provide an email address that will require disclosure of personal information. Such disclosure is strictly voluntary and might include name, email address, telephone number, etc.

Under no circumstances will EBSCO sell this information, and will only share it with third-party agents, vendors, contractors, partners or content providers of EBSCO involved in carrying out services if they safeguard this information consistent with the EBSCO Products and Services Privacy Policy. Users may choose to disallow the use of their personal information, as described in the policy.

7. Please provide your company's data security policy.

EBSCO implements an extensive information security policy that focuses on web application security (to identify potential or realized weaknesses as a result of inadvertent misconfiguration, authentication, application logic, error handling, sensitive information leakage, etc.). This policy includes firewall and router security, data classification and control, vulnerability identification, authentication, encryption, etc.

EBSCO also keeps audit trails to maintain records of system activity both by system and application processes and by user activity, which, in conjunction with appropriate tools and procedures, acts as a technical control facilitating the detection of security violations, performance issues, etc.

EBSCO's information security and infrastructure teams focus on the confidentiality, integrity and availability of our information and systems. This approach uses a multitude of monitoring tools, processes and procedures to control access (user authentication and logical access controls); protect and prevent intrusions (antivirus software, firewalls, etc.); and identify, track, monitor and report on pertinent security events. The information security incident management approach addresses any significant event, which includes communicating to all relevant individuals/groups within EBSCO for identification, categorization, analysis, remediation, and monitoring.

8. Please describe available authentication methods for end-users to sign in and check out items.

EBSCO offers a variety of authentication methods to accommodate on-site and remote access needs, including compatibility with proxy servers. Standard methods of authentication include:

- ✓ IP Address
- ✓ Referring URL
- ✓ User ID and Password
- ✓ Cookie
- ✓ OpenAthens
- ✓ Shibboleth
- ✓ HTTPS
- ✓ Personal User
- ✓ Google Sign In

Additionally, EBSCO supports single sign-on through any SAML-compliant identity solution, such as Ping, Okta and Microsoft ADFS. Several of these methods can also be employed simultaneously, and EBSCO can work with each library to implement the best possible approach to user authentication.

9. Please describe the end-user process from item discovery to check out.

EBSCO eBooks

EBSCO eBooks is a web-based, hosted solution directly accessible from a library's website or online catalog. This can be accomplished by selecting a hyperlink, icon or integrated MARC record, leading from the library's website to the point of authentication. As part of this, EBSCO offers a variety of ways for libraries to display EBSCO e-books from both the library website and the OPAC. Available methods of display include:

- Product Buttons – hyperlinked product icons that enable the library to embed a link to the EBSCO platform from any point on their website.

- Customer Search Box – a custom search box (made with EBSCO's search box builder tool) that enables users to initiate a search of the library's e-book and audiobook collection directly from the library website.

- Catalog Display – EBSCO offers complimentary MARC records for all titles, which can be easily integrated into the OPAC, so long as it is compatible with .mrc files.

Upon selection of a record (by any means), users are seamlessly linked to the *EBSCO eBooks* user interface. This platform is available through any internet-connected device, including computers, tablets, smartphones, e-readers and more. The platform can also be accessed using any common web browser and operating system.
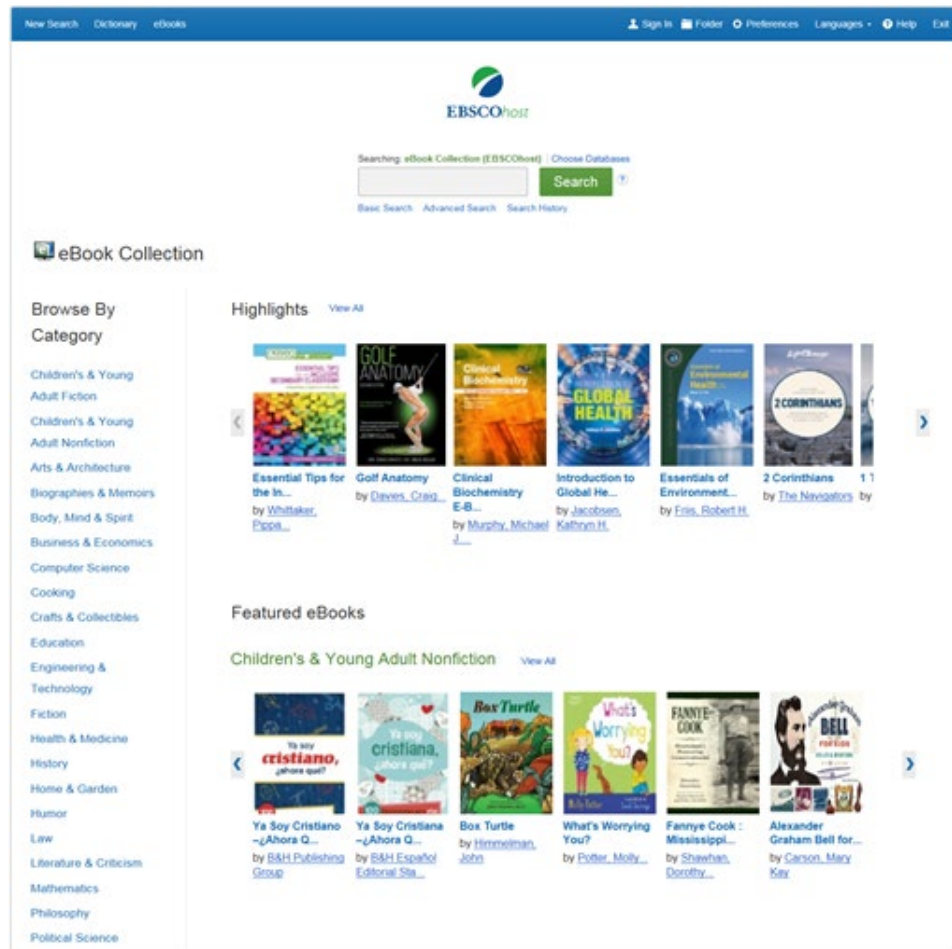
The *EBSCO eBooks* Interface

Alternatively, users can access *EBSCO eBooks* through other EBSCO interfaces, allowing users to search the library's e-book collections alongside other resources (e.g., databases, digital archives and more). Compatible interfaces include EBSCO*host*, *EBSCO Discovery Service* and *Explora* – EBSCO's dedicated interface for public libraries and K-12 schools.

Regardless of preferred interface, users have access to several tools to assist in selecting the perfect e-book for their individual needs. Below is an outline of key features available, from discovery to access:

Searching Functionality
To start, the *EBSCO eBooks* platform offers an intuitive user experience, supporting a natural progression from browsing and searching, to reading, downloading and making the most of available content.

Upon platform access, users are greeted with several options for browsing and searching available content, including basic and advanced search options, the ability to browse by category and visual carousels of highlighted and featured titles. All books displayed within these carousels and all records returned from a search will feature an image of the book jacket, a link to launch the full text or sample audio, checkout options and more.

To begin a search, most users may choose a basic keyword search, entered into a simple search box that features a clean, intuitive layout, similar to popular search engines encountered across the web.

EBSCO eBooks **Basic Search Bar**

Users can also complete an advanced query, using a variety of search modes, expanders and limiters. EBSCO's Advanced Search is supported by Boolean logic, enhanced subject indexing and book searching, allowing users to be as specific as they would like. Even with these highly targeted searching operations, the search experience remains user-friendly despite its scope.

An Advanced Search can be conducted in one of four ways: Boolean/Phrase, 'Find All of My Search Terms,' 'Find Any of My Search Terms' and *SmartText* Searching. Users can combine a search mode with expanders by selecting the 'Apply Related Words' or 'Apply Equivalent Subjects' options.

Additional search options include an array of limiters, which allow the user to refine results both pre- and post-search. Limiters are easily customizable, and standardly include:

- Author
- Category
- Subject
- Language
- Publication Date
- Publisher
- Title
- ISBN
- Download Available
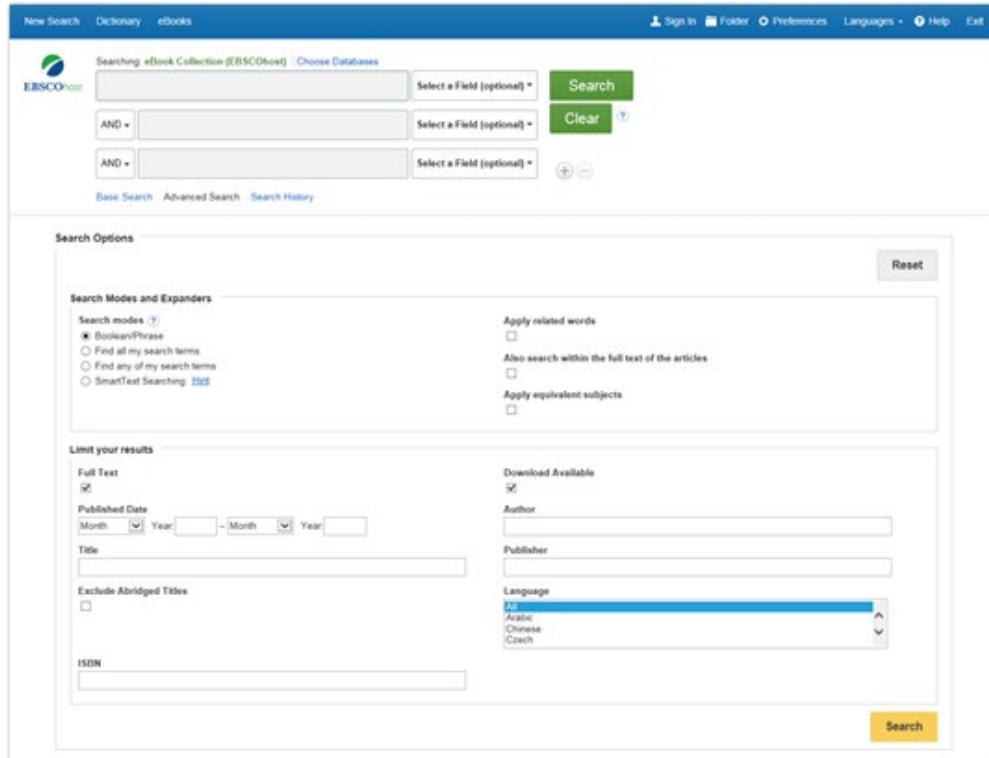
EBSCO eBooks **Advanced Search Options**

As previously noted, users can also limit keyword searches to a particular indexed field, using the drop-down menu alongside the search bar.
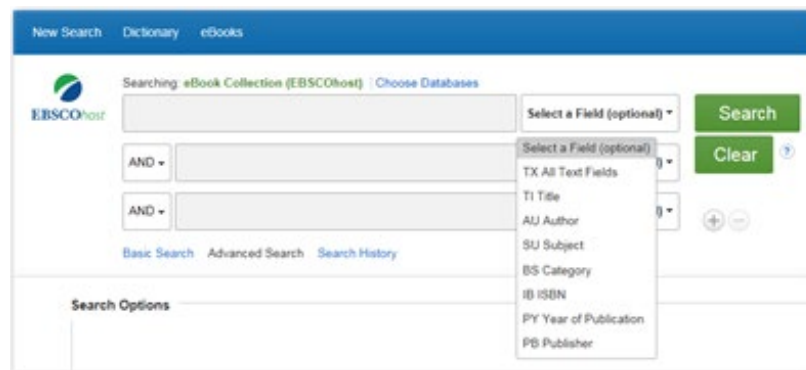
Searchable Field Codes

Once a query has been submitted, a complete set of results is returned in a matter of seconds. For each title in the Results List, a brief record provides the full title name, book jacket, author, narrator, length, subjects and publication information. Listings also include links to:

- View the full text in-browser
- Download the e-book offline (if available)
- View a hyperlinked table of contents
- View a hyperlinked listing of most relevant pages (based on search term)
- Add the title to a Personal Folder for later consideration

www.ebsco.com

<u>Checkout and Download Titles</u>
Users who have selected a title they would like to read can immediately view the PDF and/or ePUB full text online within the user-centric Full Text Viewer.
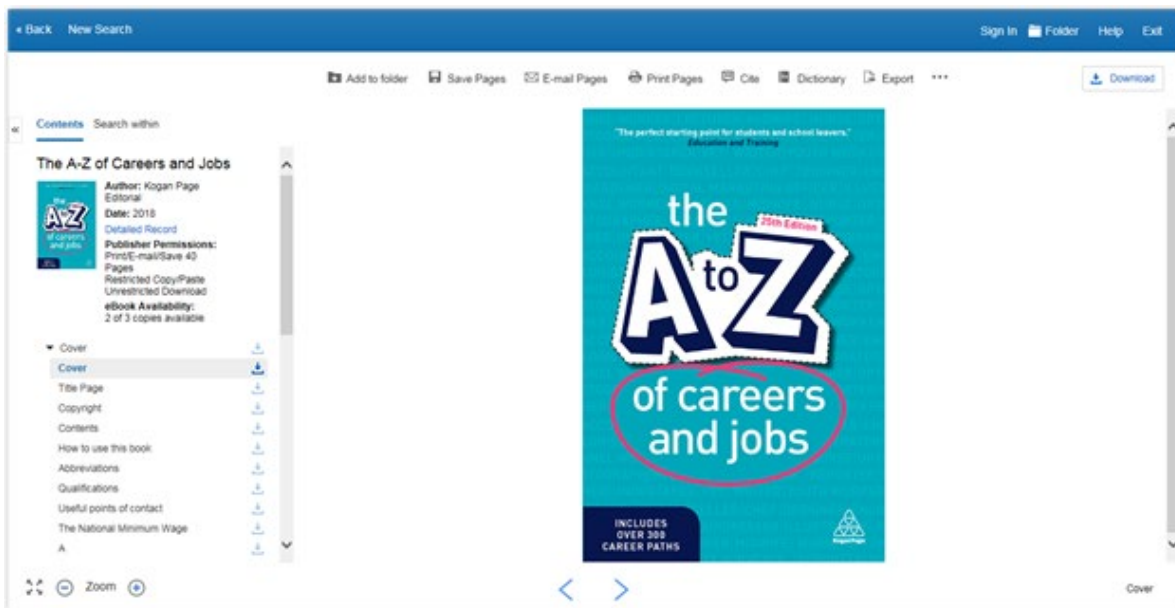
The vast majority of titles are also available for offline reading, and can be downloaded to a device in these simple steps:

- Sign into My EBSCO*host*
- Select "Full Download"
- Select checkout period and preferred format
- Select the final "Checkout" confirmation

Please note, if accessing via mobile device, users will also be prompted to open within a compatible app.
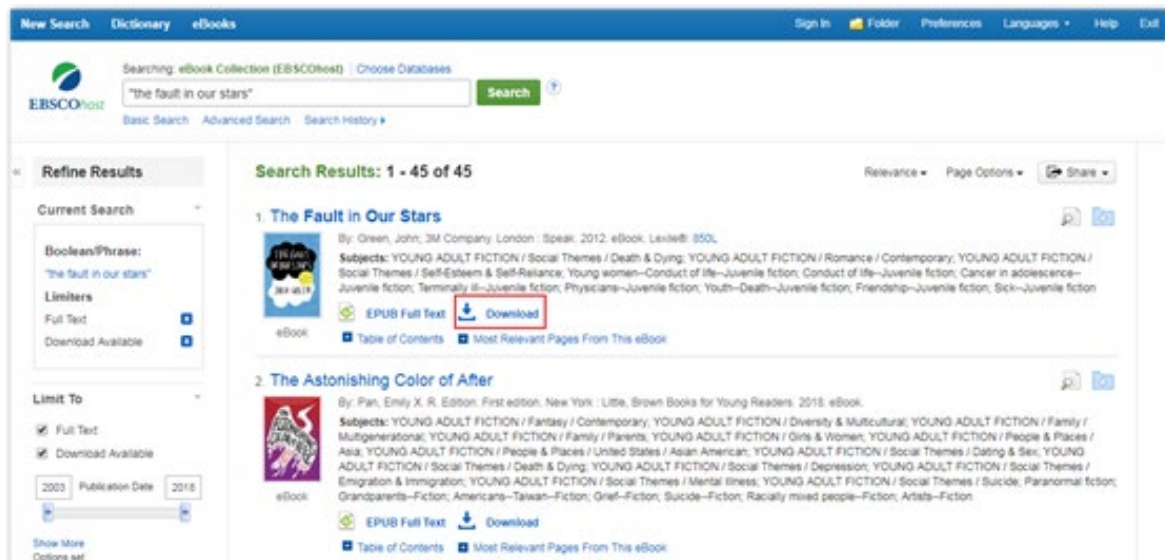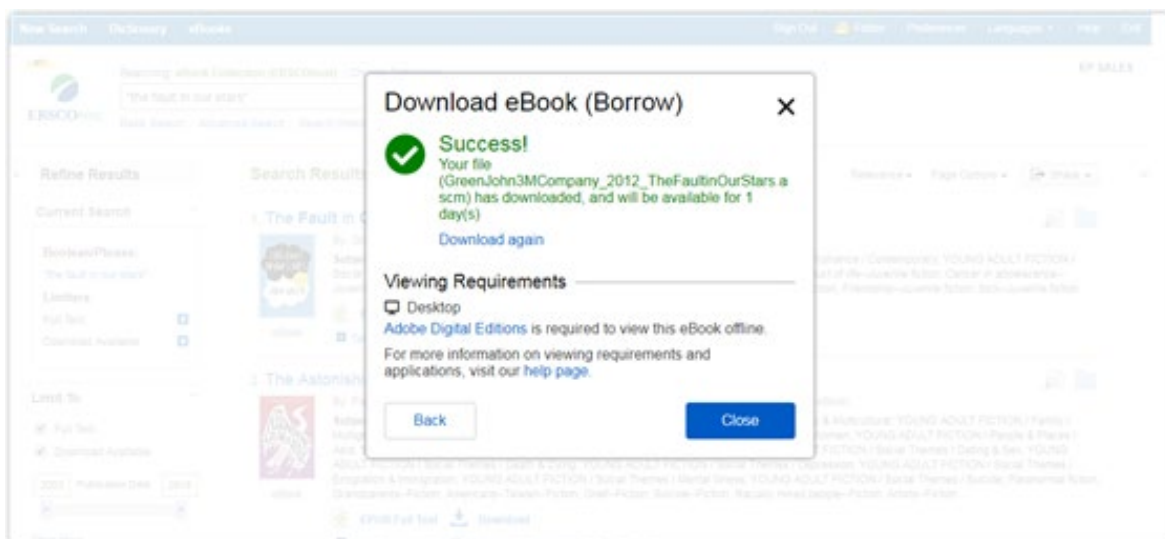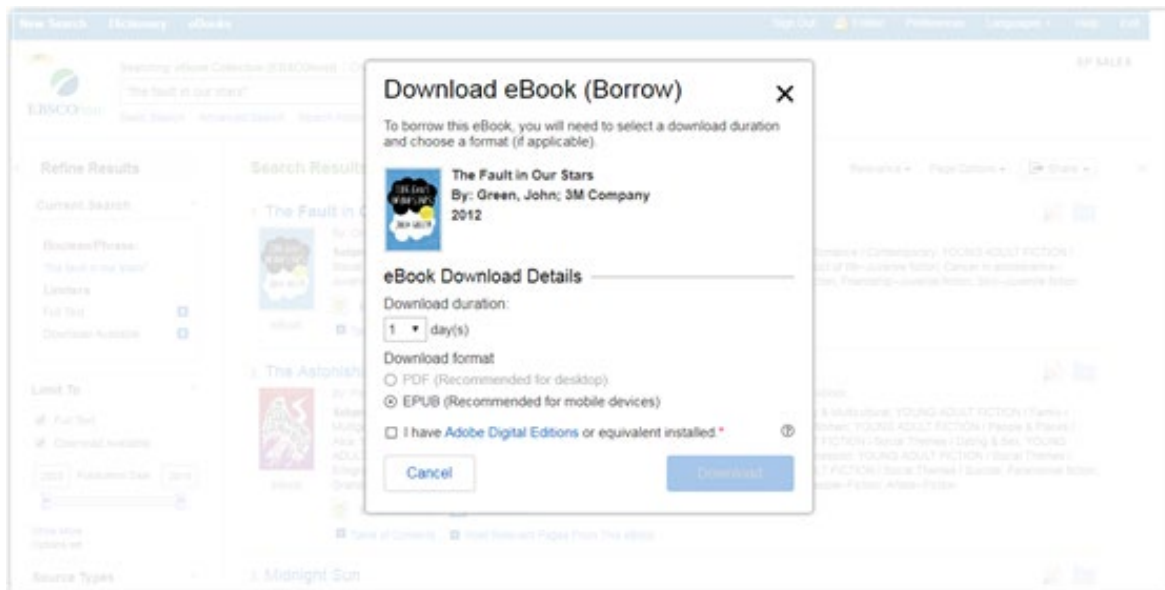
Sample Download

Flipster

With many similarities to *EBSCO eBooks, Flipster* is a web-based, hosted solution directly accessible from a library's website or online catalog. This can be accomplished by selecting a hyperlink, icon or integrated MARC record, leading from the library's website to the point of authentication. To facilitate this, EBSCO offers several enhanced integration and display options, including:

- Product Buttons – A pre-made *Flipster* icon that enables the library to embed a link to the EBSCO platform from any point on their website.

- Customer Search Box – A custom search box (made with EBSCO's search box builder tool) that enables users to initiate a search of the library's collection directly from the library website.

- Catalog Display – EBSCO offers complimentary MARC records for all titles, which can be easily integrated into the OPAC, so long as it is compatible with .mrc files.

- Custom Carousel – A web carousel featuring hand-selected titles can showcase available content, and act as a starting point to identify and access *Flipster* magazines. The placement of custom carousels is facilitated by basic website code, provided by the EBSCO support team.
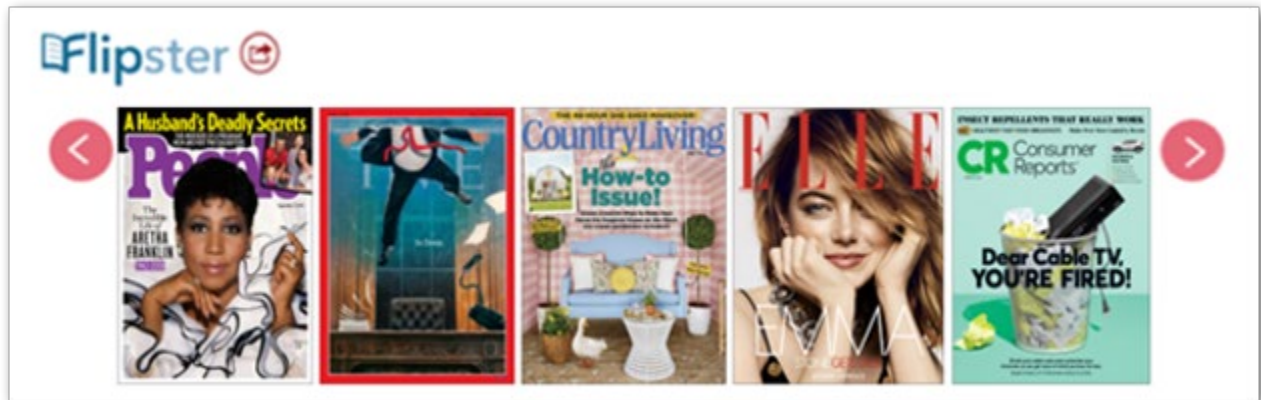
Sample *Custom Flipster* Carousel

Upon selection (by any means), users are seamlessly linked to the *Flipster* user interface. This platform is available through any internet-connected device, including computers, tablets, smartphones and more. It can be accessed using any common web browser and operating system.
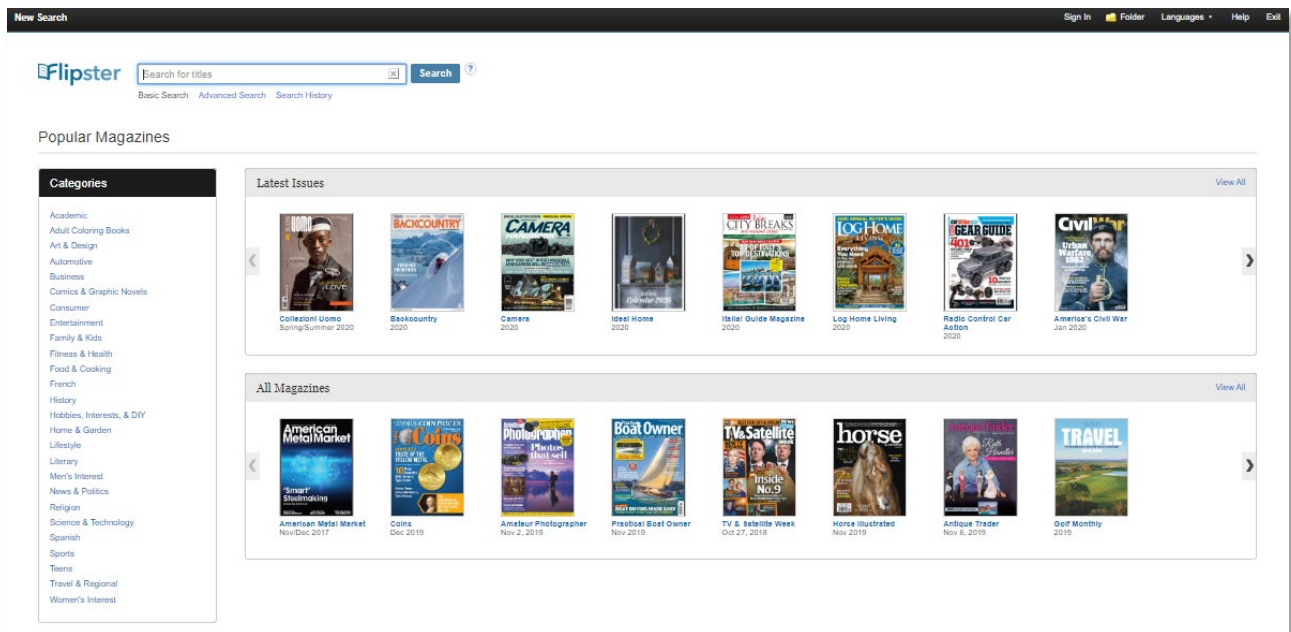
The *Flipster* interface

Alternatively, the end-to-end user experience may also be enjoyed directly in the *Flipster* app, currently available for iOS, Android and Kindle Fire. Furthermore, *Flipster* offers linked results capability; when
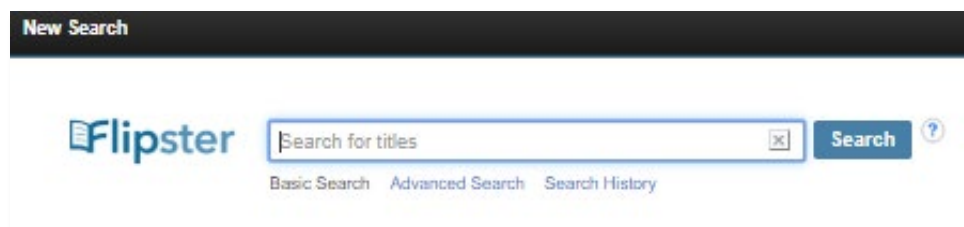
you search for a topic in EBSCO*host* or *EBSCO Discovery Service* (EDS), search results may also include links to view magazine articles in the *Flipster* viewer.

Searching Functionality

Both in-browser and in-app, *Flipster* offers an intuitive user experience, supporting a natural progression from browsing and searching, to reading, downloading and making the most of available content.
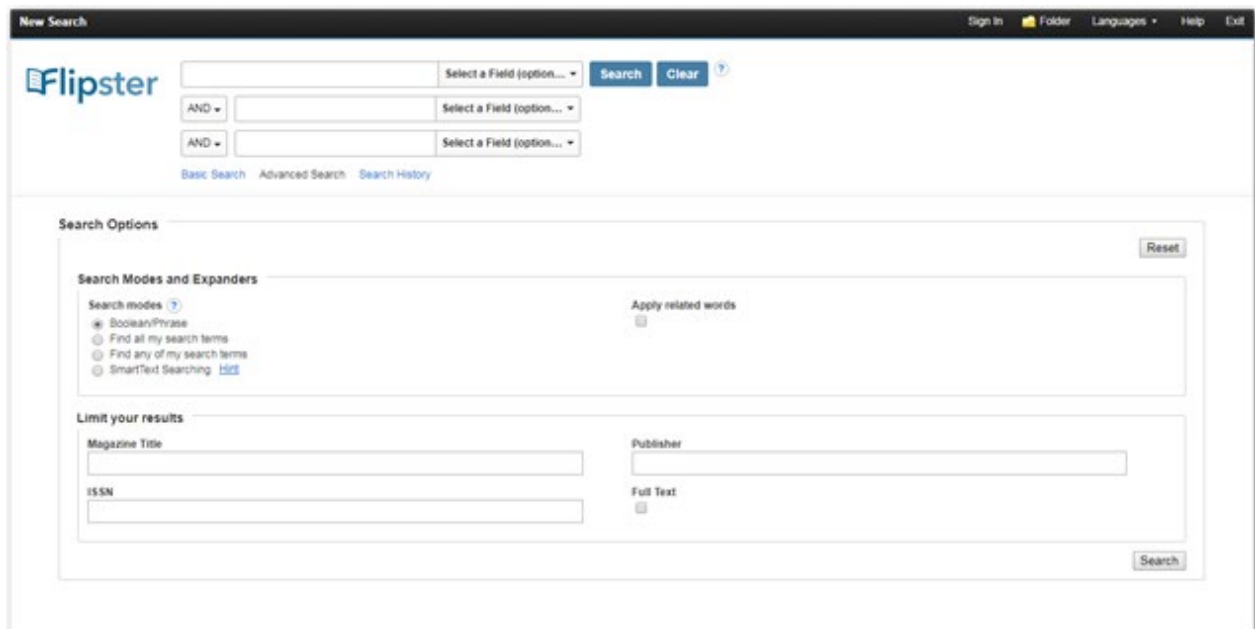
Upon platform access, users are greeted with several options for browsing and searching magazines, including basic and advanced search options, the ability to browse by language and category, and visual carousels of latest and featured issues. All titles displayed within these carousels and all records returned from a search will feature an image of the most current magazine cover, hyperlinked to launch the full-text issue.

As with *EBSCO eBooks,* the most basic form of searching is by keyword, conducted through a simple search box that features a clean, intuitive layout, similar to popular search engines encountered across the web. Search terms can be any relevant keyword, be it a specific magazine title, subject of interest or other term.

***Flipster* Basic Search Bar**

Through the Advanced Search, users have access to several added options, including choice of search modes, expanders, limiters/filters and indexed fields, as previously noted.

Advanced Search Options

Once a search query is submitted, a category selected or a carousel expanded to "View All," a complete Results List is presented. Each result includes detailed publisher, ISSN and category information, as well as a description of contents and link to view the full text in-browser ("Read This Issue").
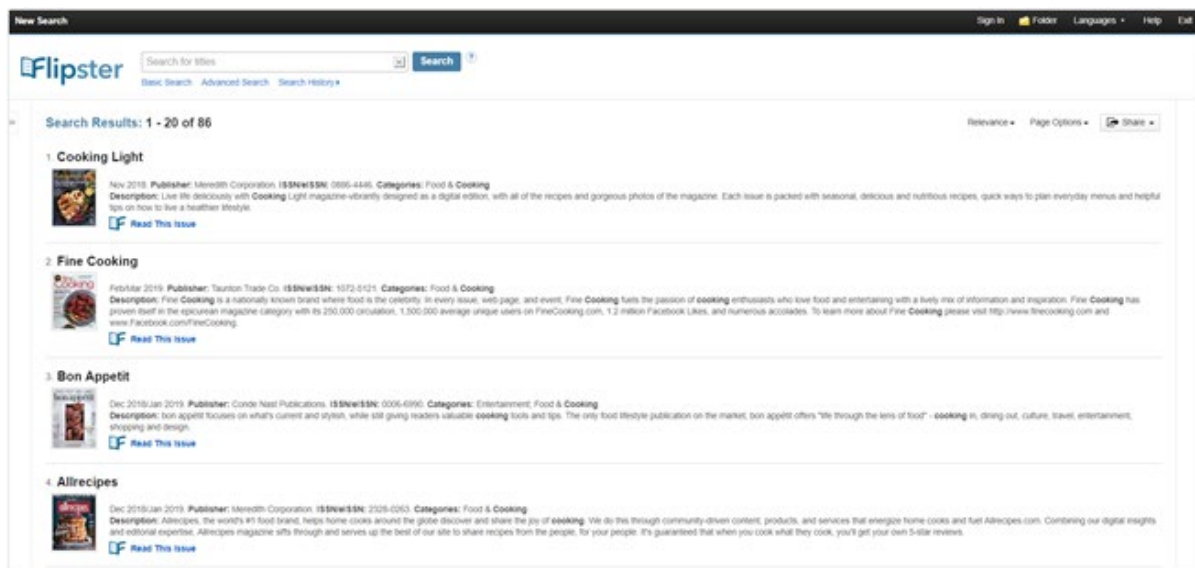
Sample Results List

By default, results are sorted by Relevance. Pending user preference, they can also be sorted by Title, Date Oldest and Date Newest.

Checkout and Download Titles
Users who have selected a title they would like to read can immediately view the full text online within the user-centric Full Text Viewer, given the title has not reached maximum user capacity. Upon selecting a title's cover or "Read This Issue," the Full Text Viewer is launched, and the latest issue opens.

Flipster **Full Text Viewer**

While all *Flipster* titles are available for online streaming, the vast majority can also be downloaded offline to the *Flipster* app. Furthermore, *Flipster* enables synching across mobile devices, so users can always access their total checkouts.

Below is an outline of the simple download process:

1. Open the *Flipster* app and tap "Get Started."
2. Find your Library and login with your *Flipster* values.
3. Search and browse available content, tapping "Download" to save an issue to your device.

If accessing via mobile browser, users who select the option to download a title will be presented an "Open in App" prompt. From here, they will be linked to the app, or asked to download if not already installed.
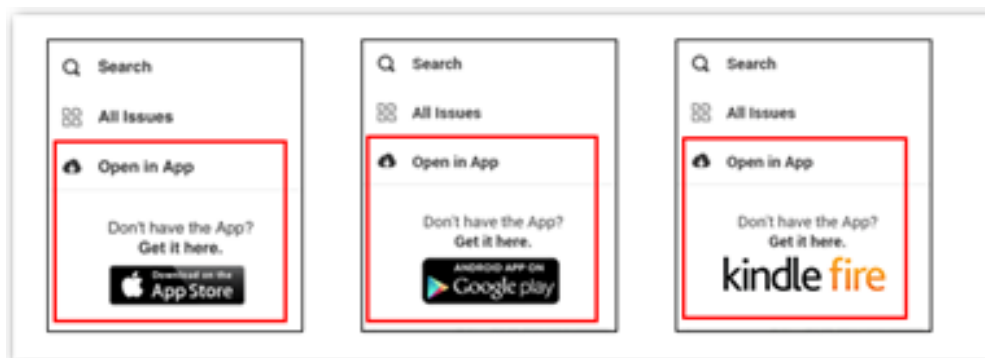
In-Browser Mobile App Prompts

10. **Please describe all the ways in which patrons can access their checked-out titles.**

EBSCO eBooks

As described above, users who have selected a title they would like to read can immediately view the PDF and/or ePUB full text online within the user-centric Full Text Viewer. The vast majority of titles are also available for offline reading and can easily be downloaded to a personal device. When accessing via mobile device, users will also be prompted to open within a compatible app.

Flipster

As mentioned above, *Flipster u*sers who have selected a title they would like to read can immediately view the full text online within the user-centric Full Text Viewer. While all *Flipster* titles are available for online streaming, the vast majority can also be downloaded offline to the *Flipster* app. Furthermore, *Flipster* enables synching across mobile devices, so users can always access their total checkouts.

Statistical Reporting Requirements

1. **Please describe the means by which participating libraries can generate and download statistical reports.**

   EBSCO offers a variety of statistics to help libraries better understand the usage and value of their resources, including a variety of *EBSCO eBooks* and *Flipster* usage reports that speak to circulation statistics for the overall collection, as well as for individual titles. Reports are available to administrators at both the individual library and aggregate system levels, free of charge. They can be broken down by institution, library type and more, as preferred. Appointed administrators may view these reports online at any time, via EBSCO*admin*.

2. **What means of generating statistical reports are available to participating libraries and consortium administrators, and in what time intervals?**

   As previously mentioned, *EBSCO eBooks* and *Flipster* reports are available to administrators at any time via EBSCO*admin* at both the individual library and aggregate system levels. They can be broken down by institution, library type and more, as preferred.

   All of the available reports are highly customizable and designed for the administrator's ease-of-use. They can be scheduled to run automatically or on demand, and can be set to reflect specific date ranges. Date ranges are by month or by year, and can run from the current date to two years prior. Report formats include: Tab-Delimited (report is delivered as a tab-delimited file that can be imported to a spreadsheet) or Excel (.xlsx). These can then be downloaded in-browser, or emailed to a preferred address.

3. **Please list what reports are available for each individual library as well as cumulatively, including the following data:**

   a. **Circulation**
   b. **New patron registration**
   c. **Collection usage**
   d. **Website analytics**
   e. **Total number of checkouts per format**

> **f.** **List of titles viewed**
> **g.** **Total number of titles and copies in collection by format**
> **h.** **Holds list and holds ratio data**
> **i.** **Usage by interface (Web, OAI, API etc)**

EBSCO eBooks
Of most interest to e-book customers, typical reports include:

E-Book Subscription Usage Reports
For libraries accessing one or more e-book subscriptions, EBSCO offers dedicated reports with several title-level usage metrics. Reports include comprehensive details on how a title is being accessed and downloaded, such as Total Downloads, Total Online Views, Total Email Requests and Total Print Requests. The library can select the subscription collection of interest and select the start and end dates for which they would like to retrieve usage. Additional information per title will include Publisher, Publication Year and ISBN.

Standard Usage Reports
Standard Usage Reports include many database-, interface- and title-level usage details, including number of searches, sessions, logins, etc. Of most relevance to e-book customers, available reports include:

1. **Database Usage Report:** Compiles database sessions, searches and full-text requests at the overall collection level.
2. **Interface Usage Report:** Reflects the number of interface sessions, searches and requests logged against an EBSCO interface within a selected time period (e.g., EBSCO*host* and *EBSCO Discovery Service*). If a library uses more than one EBSCO interface, reports can be run for each interface separately to compare their usage.
3. **Login Usage Report:** Compiles successful user logins by login method, client IP, browser, operating system and mobile device. Login method includes all methods of authentication.
4. **Title Usage Report:** Displays usage information on a title-by-title basis, including the number of requests and full-text requests logged per book.

Report options for the above include the following filters, groupings and choices:

- **Sites:** View data for all sites or a specific site. (Consortia only)
- **Database:** View usage of the entire database, or a subset of collections.
- **Interface:** Limit to a specific interface, such as EBSCO*host* or *EBSCO Discovery Service*.
- **Reporting Period:** View usage by a custom or preselected data range. Reports are available for the current year plus the previous two years.
- **Analysis Level:** Display usage at the following levels –
  - *Database* – Database being searched
  - *Interface* – An available platform (EBSCO*host*, *EBSCO Discovery Service*, etc.) that is assigned to a profile so that the library administrator can control which profiles will have access to specific interfaces.
  - *Site (consortia only)* – Any member of a consortium. Sites can have user groups of their own and can be treated as separate customers, though organized under one parent.
  - *Group* – A department or division that the site administrator can define within EBSCO*admin*. One or more user groups can be set up for any customer. By setting up these user groups,

libraries can customize access to EBSCO*host* and other EBSCO interfaces and gather usage statistics in a way that is most suitable to the customer.

- *Profile* – A profile defines the databases, collections, limiters, search screens, and other features end-users see when using EBSCO*host* or other EBSCO interfaces. Profiles are set up in EBSCO*admin*.

- **Count Aggregation:** Aggregate statistics by the total number of hits (sessions, searches, full-text requests, etc., depending on the statistic being reported) or group them on the report by year or by month.
- **Metric View:** Choose to view summary or detailed metrics.
- **Delivery:** Download ad-hoc reports, or email them (one-time or scheduled monthly) in your desired format (MS Excel or tab delimited).

COUNTER R5 Reports

EBSCO*admin* also offers COUNTER R5-compliant reports. COUNTER R5 reports that contain e-book data include:

- **TR_B1: Book Requests Report:** It provides two metrics –

  - Total Item Requests: combines all "requests" for or interactions with a title. In other words, it would add up all full text views plus chapter downloads (plus print requests, etc.).

  - Unique Title Requests: The number of times an e-book was accessed in a single patron's session. If a single user downloads multiple chapters from an e-book, or accesses the e-book several times during a session, all of these would count as one Unique Title Request (each of these interactions would also count as item requests and counted in the Total Item Requests counted above).

- **TR_B2: Book Access Denied (Turnaway Report):** This report remains unchanged from COUNTER 4. It reports on "Access_Denied" activity for books, where users are denied access because simultaneous-use licenses were exceeded, or their institution did not have a license for the book.

- **TR_B3: Book Usage by Access Type:** This report is similar to TR_B1 but also includes "investigation" metrics which count clicks on the abstract (Detail Record for eBooks) and is broken out by "Access Type." Access Types are either "Controlled" (user has to be authorized/authenticated), or OA Gold (Open Access). *EBSCO eBooks* does not include Open Access monographs today.

  - Total Item Investigations: Includes clicks on anything related to the e-book plus access of the e-book itself. In other words, it would combine clicks on the detail record, cited references, interlibrary loan form plus clicks on the full e-book, chapters, etc.

  - Unique Item Investigations: Similar to Unique Title Investigations, this consolidates all investigations in a session into a single count (if a user has many different investigations with the same e-book (chapters, full retrievals, abstract views, linkouts) during a user session it would count as one Unique Item investigation.

- Total Item Requests: Same as Total Item Requests above (adds together all full text views, plus chapter views, plus full-book downloads).

- Unique Item Requests: The number of unique content items requested (full-text) in a user-session. Examples of items for e-books are books and book chapters. So, if a user downloads a full e-book and then downloads a chapter from that same e-book, this would count as one Unique_Title_Request, but two Unique_Item_Requests.

- Unique Title Requests: Same as above (if a single user downloads multiple chapters from an e-book, or accesses the e-book several times during a session, all of these would count as one unique title request)

- **Title Master Report:** Allows filtering and aggregation options which can provide some custom reports for e-book customers. Customers can filter by data_type='Book' and aggregate by section_type to see a breakdown of full vs chapter usage. They can also filter by section_type if they just want to see full usage, or just want to see chapter usage. None of the standard reports offer those breakdowns so this provides a way to offer additional views.

eBook Title Usage Reports

The eBook Title Usage Report includes detailed metadata, purchase information and usage points at the individual title level, offering enhanced analysis of your overall collection. The report can be run by all e-books (regardless of usage), by e-books with usage only or by e-books with no usage. For convenience, the report combines titles acquired by all purchase models, including subscription titles, into one unified output. As a result, it offers valuable detail for informed collection development and future decision making.

Sample report fields include:

- LCC
- BISAC Subject Heading
- Language
- Format (PDF/EPUB)
- Access Model
- Purchase Type (Owned, Shared, Subscription, etc.)
- Date Purchased
- DRM-free (Y/N)
- Active Holds
- Chapter Downloads
- Print/Email/Save Requests
- And more

Top Search Terms Report

This report captures search terms from user-submitted search clicks, restricted to the top 1,000 distinct search terms per interface. The report usage grid includes top search terms, search term frequency counts, and result click conversion counts for the selected reporting period. Usage grid data can be filtered by site, interface and keyword, and can be exported to an Excel and tab delimited text file. In addition, three data visualization views are included for visual analysis: Term Cloud, Trending Search Terms by Rank, and Search Click Conversions by Interface.

Flipster

Currently, available *Flipster* reports include the following:

- Platform Report: Tracks total number of sessions, search clicks, views, downloads and turnaways.
- Title Level Report: Tracks usage counts by title, including views, downloads and turnaways.
- Issue Usage Report: Tracks total number of views, downloads and turnaways by title, volume and issue.

Report Setup Screen

4. Please describe how generated reports protect patron privacy.

As mentioned within the EBSCO Products and Services Privacy Policy, users of EBSCO products are not typically known to EBSCO as individuals. Individual user information is not captured when generating statistical reports.

EBSCO will only collect and use personal information when a user voluntarily provides it to EBSCO or when an institution or entity customer provides it in connection with its method of authenticating users for access to products, with the exception of an institution's IP address which may be automatically captured when a user accesses a product.

5. Are statistical reports available for export in CSV, xlsx, JSON, XML? What other file formats are available?

EBSCO statistical reports are available in the following formats: Tab-Delimited (report is delivered as a tab-delimited file that can be imported to a spreadsheet) or Excel (.xlsx). These can then be downloaded in-browser or emailed to a preferred address.

6. Is the interface interoperable with Google Analytics?

EBSCO can work with customers to incorporate Google Analytics into the interface. To facilitate, the library administrator will need to add a small snippet of JavaScript into the branding to allow for this functionality. EBSCO encourages incorporation of Google Analytics usage tracking to maximize the capability for collection analysis by librarians.

Marketing Requirements

1. **Please describe what kind of marketing content (electronic, print) is available to participating members as part of the contract cost: in what format, in what quantity, and how frequently it is updated.**

   EBSCO understands that library resources are only as good as a user's knowledge of and ability to use them. Educating administrators, teachers and end users about the features, functionality and availability of EBSCO's resources is the key to their use and value.

   Knowing this, EBSCO provides extensive promotional materials ongoing to support and encourage use of the institution's EBSCO resources, at no additional cost. Promotional materials include a wide variety of marketing deliverables, such as advertisements, flyers, posters, training announcements, email templates, landing pages, bookmarks, monitor toppers, social media templates, web-based icons and more.

   If awarded a contract with the Montana State Library, EBSCO's goal would be to provide a great deal of support in generating awareness and subsequent usage of the library resources, and the value of libraries overall. As part of this effort, EBSCO can provide a custom Marketing/Promotional program, offered at no additional cost beyond that of the services quoted herein. EBSCO's approach in providing this type of support is to understand the goals and needs of the libraries, and work to develop programs to support those goals.

   While the libraries may have a desire to specifically promote individual EBSCO resources, the program focus would be much broader. In other words, EBSCO would work with the library to bring increased awareness to the initiatives, resources and programs available as the library sees fit – not just as it relates to EBSCO resources. EBSCO believes that by bringing more attention and usage to these resources and libraries overall, we together increase the value of schools, libraries and initiative across the state, leading to increased value for end users.

   As part of this program, the state library would have access directly to EBSCO's Marketing team, which is tasked in part to work with EBSCO's largest customers to provide custom marketing programs. Sample deliverables can include radio and print ads, bookmarks, flyers and posters, as well as access cards, brochures, monitor toppers, window clings, mousepads and more.

   To help facilitate Marketing efforts, EBSCO will assign Beth Howell, Marketing Manager, and her team to act as a marketing firm on behalf of the state and its objectives. Beth will oversee all marketing campaigns and provide the library with a customized marketing plan aimed at raising awareness and usage of its services and resources.

   While each program is different, and is in a different phase of marketing, this approach has worked well in several other statewide initiatives, including Wisconsin, Arizona, INFOhio, GALILEO, West Virginia MAGNOLIA, Alabama, Delaware and others.

Support Requirements

1. **Please describe consortium's ability to add or remove participating libraries.**

   The consortium can add or remove participating libraries throughout the subscription period or at time of renewal. The library can work with its dedicated sales representative when changes need to be made.

2. **Please describe the cost for adding or removing participating libraries, if any.**

   There is no cost for adding or removing participating libraries.

3. **Please describe any restrictions on types of libraries that may participate in this contract.**

   EBSCO eBooks
   There are no restrictions on types of libraries that may participate in this contract.

   Flipster
   A contract for *Flipster* would be limited to public libraries.

4. **Is interface scoping available to curate library- or library-type specific collections? Please describe.**

   To curate collections, a library can create user groups and distinct profiles within its EBSCO implementation.

   User groups can be a department or division within the institution's population and would be defined by the library administrator using EBSCO*admin*. User groups are useful in controlling permissions — or access to — certain resources. For example, a library may wish to create a new user group specifically for one type of library, or for users affiliated with a specific area of research. Profiles are made up of the collections, limiters, search windows and other features that end users will see when accessing through the group.

   Each library customer may have many user groups, and each user group can have many profiles. By setting up these different configurations, the library can easily customize access to services. Once a user group has been created, administrators will also have access to usage statistics attributed to that group, allowing the library to gather usage statistics as desired.

   Furthermore, several of EBSCO's e-content collections are already scoped for particular markets, rendering the application of specific collections to certain groups very simple.

5. **Can the consortium add libraries using disparate Integrated Library Systems (ILS)?**

   EBSCO's products and platforms are designed to be as open as possible and to integrate with most major ILS vendors worldwide. Once downloaded, a MARC record can be loaded into and accessed through any library catalog, regardless of ILS and discovery service, so long as it is compatible with ".mrc" files. Upon selection, the user is linked to the EBSCO platform, where authentication credentials are verified and he or she may continue on to read, check out and/or download the title.

It is also important to note that EBSCO is an active proponent of an open, interoperable library environment across technology and data sharing, as evidenced by its participation on the NISO Open Discovery Initiative Committee, partnerships with more than 60 ILS providers, the company's work in support of FOLIO (an open technology platform) and EBSCO's metadata sharing policy. As a content provider, EBSCO strives to work with all discovery vendors in a way that encourages and requires mutual sharing, and since 2014 has offered to share metadata in a collaborative way with many discovery service vendors. EBSCO has an enormous number of partnerships with publishers and database/content providers, and has been in discussions with other discovery vendors on this topic. EBSCO appreciates that libraries desire to enhance open interactions across the library community and will continue to work toward this mutual goal.

6. **Please describe availability of and access to technical support assistance and resources for consortium administrators and for participating library staff.**

While EBSCO products are designed to be intuitive and easy to use, EBSCO does offer ongoing support for both administrators and end users through several channels, including the complimentary services of our Technical Support department, as well as various online tools. All support is available throughout the initial set-up phase and ongoing, at no additional charge to customers:

Technical Support Department
EBSCO offers Technical Support free of charge to customers. EBSCO's Technical Support representatives are trained to fully resolve any questions or issues related to EBSCO products. This support is offered 24 hours a day, 7 days a week via the following methods:

- Toll-Free Telephone: (800) 758-5995
- Email: support@ebsco.com
- Online: https://connect.ebsco.com/s/contactsupport

Over 70% of cases reported to EBSCO's Technical Services Department are opened and resolved within the same business day. On average, callers into the Technical Support queue wait no more than 20 seconds. Email support requests receive an auto-generated response email with a case tracking number, with a further response provided by a Technical Service representative. EBSCO will generally respond to all technical service requests within 24-48 hours.

All Technical Service requests are assigned case numbers in the EBSCO Case Tracking system. When a problem is reported, it is generally responded to within 24-48 hours. Whenever possible, it will be resolved immediately, and the customer will be notified. If a problem requires further investigation, Technical Support will escalate the matter to EBSCO's Expert Services Team who will assist in troubleshooting the issue and, if required, track the problem through resolution with the appropriate technical, editorial and product teams within EBSCO. During the resolution process, customers will be kept informed of the progress, and all communications will be tracked to maintain a complete history. Once the issue is resolved, the customer will be notified, and the case will be closed.

Generally, this support is meant for library/administrator use; EBSCO asks that end user support queries be escalated to the support department through the library, as necessary.

EBSCO Connect

The EBSCO Connect support site (www.connect.ebsco.com) is a re-imagined customer support experience, helpful for administrators, end users, trainers and more. Designed with all customer levels in mind, it offers extensive product documentation, recorded and live training sessions, as well as promotional materials and system alerts. It provides a space for EBSCO to enhance the support experience, connecting users with the resources that will best help them take advantage of EBSCO products and services. For customers that log into the system, the support site also features a case management system and peer-to-peer community forums. EBSCO Connect is available 24/7 and is accessible from the bottom of every EBSCO interface page.

Interface Help Link

To support end users on-platform, EBSCO also provides an interactive "Help" link, located in the upper right corner of each search screen. In *EBSCO eBooks* and *Flipster*, the Help link brings users to an online help module. This comprehensive system provides information on all aspects of the interface, and can be searched by keyword or phrase, while also providing a full index of help topics. Information available through the Help link is always kept current, accurate, easily understood, well-organized and context sensitive. The module provides users with a detailed table of contents, arranged by main topics, with hyperlinks to subtopics beneath each. When the Help icon appears, users can click on the link, and help for the screen they are on will display. To view the entire Help system, users would select the Help link at the top right corner of the search screen, from the universal interface toolbar.

***EBSCO eBooks* LibGuide**

Designed for use in a library setting, the *EBSCO eBooks* LibGuide offers library users and staff a basic guide to the most important information to know regarding *EBSCO eBooks*. Content is presented in an easy-to-read, bulleted format with clear, concise information, and is accompanied by several instructional tutorials. The LibGuide can be found here: http://ebsco.libguides.com/ebooks

EBSCO eBooks highlights include content on e-book basics, as well as targeted information for staff. Examples include:

- Creating a personal My EBSCO*host* folder
- Saving, printing and emailing book chapters
- Citing e-books
- Checking out and downloading to a PC
- Supported devices and apps
- Retrieving e-book statistics
- Subscription usage reports
- Administrator FAQs
- Customizing *EBSCO eBooks* in EBSCO*admin*
- Ways to build your collection

EBSCO eBooks **LibGuide**

EBSCO *Flipster* LibGuide

Similarly designed, the EBSCO *Flipster* LibGuide (https://ebsco.libguides.com/flipster) offers a basic guide to the most important information regarding *Flipster* for successful use in a library setting. Content is also presented in an easy-to-read, bulleted format with clear, concise information, and accompanied by instructional tutorials as relevant.

Flipster LibGuide highlights include the following key topics:

- Supported browsers and system requirements
- Searching for magazines
- Using the mobile viewer
- Using Full Text Viewer tools
- Checking out and downloading to a PC
- Support devices and apps
- How to get the *Flipster* app
- *Flipster* app features and FAQ

Flipster **LibGuide**

Dedicated Personal Support

To best serve library needs, EBSCO provides all customers with a highly experienced, dedicated sales team, available to coordinate, direct and assist in the implementation, performance, training and ongoing support of all products and services. These seasoned team members have performed the same services for thousands of public libraries, academic institutions and schools, and have coordinated services for a variety of library systems. Working hand in hand with sales, EBSCO's marketing department also offers ongoing promotional support via custom materials and more.

Project management teams are assigned at the beginning of each customer's relationship with EBSCO. They are equipped with detailed knowledge of each member library's personal account, and available to facilitate all aspects of contract management. They will be available whenever needed. The dedicated team assigned to the Montana State Library includes the following highly qualified personnel, who would have primary responsibility for initiating services resulting from this opportunity:

➢ Field Sales
  o Kevin Leffew, *Vice President of Field Sales*
  o Greg Padilla, *Director of Field Sales, Academic Libraries*
  o Alejandro Rojano, *Director of Field Sales, K-12 & Public Libraries*
  o George Dragich, *Regional Sales Manager, Academic Libraries*

      o   Edward Lott*, Regional Sales Manager, K-12 & Public Libraries*

  ➢ Inside Sales
      o   Conall Haley, *Vice President of Inside Sales, Academic Libraries*
      o   Mark Balentine, *Vice President of Inside Sales, K-12 & Public Libraries*
      o   Bob Nickerson, *Account Executive, Academic Libraries*
      o   Ariele Pappalimberis, *Account Executive, K-12 & Public Libraries*

As part of our commitment to customer satisfaction, EBSCO is also happy to offer the state library a dedicated Customer Account Specialist (CAS) and Engagement Manager.

  ➢ Todd Graham, *Customer Account Specialist*
EBSCO's CAS team is charged with the care of EBSCO's most important accounts, acting as direct support contacts. Todd will be available to provide ongoing technical support and account management, informed by detailed knowledge of your particular resources and key performance indicators (KPIs). Having a dedicated CAS provides the Montana State Library with continuity and customized assistance in meeting all manner of support request, including navigation of all technical queries.

  ➢ Jason High, *Engagement Manager*
Jason's primary role as an Engagement Manager is to promote EBSCO resources through training and consultation. He can work with the MSL on a training plan that meets library needs across markets.

7. Please describe any options for technical support to registered end-users.

As described above in **Support Requirements, Question 6**, EBSCO offers ongoing support through several channels. For end users, most applicable channels include:

- EBSCO Connect. EBSCO Connect is available 24/7 and is accessible from the bottom of every EBSCO interface page. The EBSCO Connect support site is designed specifically for customers, providing detailed support information on all EBSCO products and services.

- Interface Help Link. To support end users on-platform, an interactive "Help" link, located in the upper right corner of each search screen and brings users to an online help module. This comprehensive system provides information on all aspects of the interface, and can be searched by keyword or phrase, while also providing a full index of help topics.

- *EBSCO eBooks* and *Flipster* LibGuides. This LibGuide offers library users a guide to the most important information to know regarding *EBSCO eBooks* and *Flipster*.

8. Please describe what functionality is available to participating library staff through administrative website.

EBSCO*admin* is offered as the online administrative module for *EBSCO eBooks* and *Flipster*. With EBSCO*admin*, libraries can easily manage tasks related to collection management, interface customization and usage reporting. Key functions that can be carried out include:

    ✓ Administering local collections and related detail
    ✓ Establishing methods of authentication
    ✓ Developing customized links
    ✓ Creating profiles
    ✓ Scheduling reports
    ✓ Creating user groups
    ✓ Changing passwords
    ✓ Enabling multilingual options
    ✓ Customizing interface branding
    ✓ Setting up and customizing search preferences
    ✓ Setting up and customizing results display options
    ✓ Adjusting checkout preferences and related limits

At the individual library level, administrative options also include:

- Selecting the specific collections to which users will have access. Different sets of users (as determined by their user group and profile) can be assigned different collections from among those subscribed to by the library.

- Creating collections of publications held by the library and assigning specific messages to indicate whether or not these items, referenced by search results, are held in the library.

- Customizing search limiters to appear on the interface search screens. Limiters can also include local collections, thereby allowing a user to view only items available in the library.

- Creating links from EBSCO record displays to the library catalog or other web-based tools, such as *Full Text Finder*, SFX or JSTOR.

- Statistical and usage reporting by library, by collection, by title within each library, number of queries, number of sessions, method of access, etc. Usage reports are available for all participating institutions and each participating library.

9. Please describe what functionality is available to consortium administrator through administrative website.

In addition to the functionalities listed above, consortium administrators have added rights in EBSCO*admin* (as compared to an individual library). These capabilities include:

- Access and control over EBSCO*admin* accounts for all accessing sites within the consortium. Consortial administrators can control authentication methods, profile maintenance, activating databases, etc.

- The ability to apply "user defined fields," which allows the consortium administrator to label accessing sites. "User defined fields" are used for reporting purposes.

- The ability to run usage statistics for their own institution as well as all accessing sites within the state.

○ Consortium administrators can create an EBSCO*admin* User ID and Password with specific assigned roles, providing the flexibility to allow a staff member to perform certain tasks, without giving them rights to all parts of EBSCO*admin*. A consortium administrator can add users to all sites and globally change the roles for every user in the consortium, simultaneously.

10. **Does the respondent provide invoicing capability to consortium administrator in order to assign invoices to participating libraries for shared collection budget?**

For both *EBSCO eBooks* and *Flipster*, EBSCO can assist participating libraries with special invoicing requests, as outlined.

11. **Please describe any transition assistance available to move purchased/licensed collection in the event of contract termination.**

EBSCO titles cannot be hosted on another provider's platform. In the event of contract termination, the subscription would be ended and access withdrawn.

Flipster
Flipster titles cannot be hosted on another vendor's platform. If the library chooses to cease work with EBSCO, or the contract expires prior to a title's subscription end, the customer would receive their *Flipster* magazines until the end of their subscription period.

Technology Requirements

1. **Please describe options for a mobile app that is compatible with all major platforms and how end-users can obtain it.**

EBSCO eBooks
EBSCO eBooks does not have a dedicated mobile app; however, upon content download, the e-book viewer will detect the device and prompt use of a compatible app. *EBSCO eBooks* features may differ depending on what reader app is downloaded.

Also note that some devices that do not require use of an app. In this instance, downloaded e-books can be transferred from a desktop as needed, using Adobe Digital Editions 1.7.1 or higher.

Flipster
The dedicated *Flipster* app is currently available for iOS, Android and Kindle Fire. The app is available for free download at any time, from the App Store (iOS), Google Play (Android) and Amazon Store (Kindle Fire). Downloading magazines for offline reading may only be accomplished through the *Flipster* app.

Through the app, users simply identify their library using an interactive Locator, authenticate once to access the library's collection, and proceed to browse, search, download, and read content. Additional benefits of the app include the following capabilities:

- ✓ Locate, add and toggle between multiple libraries
- ✓ Browse by "All Magazines" or "Category"
- ✓ Basic keyword search by title, description, category, publisher, etc.
- ✓ Sort results by "Recently Published" or "A-Z"

✓ Access detailed information records for each title
✓ Review and download back issues right from the detailed record
✓ Easily swipe left or right to flip through pages
✓ Tap an article title on the cover to go directly to that article
✓ Bookmarking and tag magazine articles for later access
✓ Easily track your percentage read
✓ Sort e-magazines by date downloaded or alphabetically
✓ Toggle between a shelf of all downloads and current reading
✓ Multiple viewing options, including text-view only

To facilitate in-app use, all icons and labels are clear, meaningful and easily understood, often accompanied by images for added context and definition:
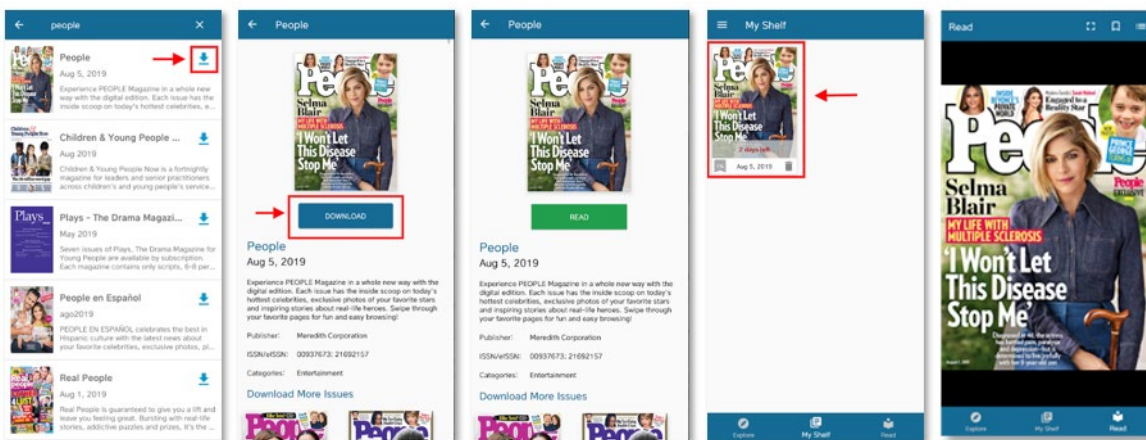
The *Flipster* App Experience (Android)

2. **Please describe the minimum hardware, software, and bandwidth capability needed to access the respondent's system.**

EBSCO's platforms are web-based and accessible through any internet-connected device, including computers, tablets and mobile phones. They are compatible with any common web browser and operating system. They are also responsive by design to accommodate any screen size.

However, for best results, EBSCO does recommend use of some minimum software and browser versions, which have been tested and confirmed to support full features and functionality. These include:

- Internet Explorer, Safari: 11.0 or later
- FireFox, Google Chrome: Latest version plus one previous version

Please also note, EBSCO platforms have no documented bandwidth requirements. However, there are many variables in determining an appropriate speed:

- Number of devices accessing the internet
- Number of simultaneous users
- Frequency of large volume downloads

When issues occur, libraries may consult with Customer Support or the EBSCO Connect site for assistance: https://connect.ebsco.com/s/article/Connectivity-Troubleshooting

Additional parameters for the two platforms have been outlined for your reference below:

EBSCO eBooks

On-platform, *EBSCO eBooks* users are able to search, browse, read and checkout titles. Additional access details include the following:

- Reading online: To vertically scroll *EBSCO eBooks*, and/or to view an e-book in EPUB format, the following browsers are recommended: Mozilla Firefox, Google Chrome or IE 11.0 or later.

- Downloading Offline to Computer: For desktop reading, DRM-protected e-books will require Adobe Digital Editions 1.7.1 or higher to access.

- Tablets and Mobile Access: Users can access the platform on a tablet or mobile device through any common web browser. In addition to reading in-browser, many titles can be downloaded offline; some devices and file formats may require use of a reader app. Supported readers commonly include:

    - Apple (iOS) Devices such as iPad, iPhone, iPod Touch
    - Android Devices such as smartphones and tablets
    - Sony eReader Touch Edition
    - Barnes & Noble Nook
    - All readers supporting Adobe DRM

    Please also note:

    - Compatibility does not extend to mobile devices that use the Windows operating system.
    - DRM-protected e-books can only be downloaded to a device that supports Adobe DRM.
    - For devices that do not require use of an app, downloaded e-books can be transferred from a desktop as needed, using Adobe Digital Editions 1.7.1 or higher.

Flipster

The *Flipster* interface can be accessed online, in-browser. Alternatively, the end-to-end user experience may also be enjoyed directly in the *Flipster* app. While all magazines are available for online reading in-browser, titles can only be downloaded into the *Flipster* app, currently available for iOS, Android and Kindle Fire. The app is available for free download at any time, from the App Store (iOS), Google Play (Android) and Amazon Store (Kindle Fire).
For tablet/mobile access, the following minimum versions are recommended:

- iOS: Versions 9 and higher
- Android: Version 4.2.2 (Jelly Bean) and higher
- Kindle Fire: Running Fire OS

3. **Do all of the product's interfaces and applications meet Americans with Disabilities Act (ADA) electronic access standards?**

EBSCO's goal is to provide a positive experience for all customers and users. To that end, accessibility is a key consideration in all product development and delivery strategies. EBSCO makes every reasonable effort to have our products and services available to all customers and users, especially those with print disabilities, allocating significant time and resources towards ensuring these customers and users have equal access.

As part of this commitment, EBSCO product development teams employ enterprise standards based on those used by the U.S. federal government for technology accessibility for people with disabilities (e.g., Section 508). EBSCO strives to comply with the World Wide Web Consortium's Web Content Accessibility Guidelines (WCAG) Levels A and AA.

EBSCO uses automated tools for testing accessibility issues. Moreover, EBSCO regularly tests our sites using a variety of assistive technologies and tools:

- Testing with screen readers (e.g., JAWS, NVDA, VoiceOver)
- Mobile accessibility features (e.g., VoiceOver, TalkBack)
- Accessibility checklists and other tools (e.g., aXe, WAVE, Color Contrast Checker, Accessibility Insights, etc.)

When new assistive technologies are introduced in the market, EBSCO also makes it a point to consider them in our testing and build.

In addition to screen reader capability, other notable assistive technology features include:

- ARIA Landmarks for screen reader navigation
- Descriptive text for images and non-text elements
- Accessible full-text formats, such as EPUB
- Responsive user interfaces for access on all devices
- Structured web content with heading levels to assist in navigation and provide content relationships
- Access keys for keyboard-only navigation

Particular to **EBSCO eBooks**, please also note:

o Online, for PDF-formatted e-books, a hidden link is available to activate the delivery of ASCII text for consumption by a screen reader. When the ASCII text is activated, title, alt tags and introductory text are properly accessible. When using a keyboard to navigate, tab order within the online e-book viewer is maintained.

  - EBSCO's online reader provides books in two formats, PDF and EPUB. Many books are available in both formats, while others are available only in one format.

  - EPUB books automatically reflow and will resize to fit the screen and the text can be resized easily by the end user. PDF-formatted books have distinct pages, which allow for page-level citations. However, they have a fixed page size that may not work well on all devices or

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screen sizes/zoom levels. PDF-formatted books are broken into individual pages which can take more time for accessibility and text-to-speech (TTS) tools to navigate.

- o Offline (downloaded) DRM-protected e-books utilize Adobe Digital Editions software (ADE). ADE leverages accessibility features on Windows and Mac OS to support blind and low-vision users, such as high-contrast modes and resizing of the book's text. Newer versions of ADE also offer keyboard support. Screen reader users can utilize many different tools to read books with digital editions. More information about accessibility via ADE is available here: https://blogs.adobe.com/accessibility/category/digital-editions.

    Both PDF and EPUB-formatted e-books can be downloaded for offline reading if allowed by the publisher. DRM-protected eBooks must be opened in a program which supports Adobe DRM, such as Adobe Digital Editions or an Adobe-compatible reader app. When downloaded offline, our growing collection of DRM-free eBooks can be opened in any program which is compatible with the file format (.pdf or .epub). Additionally, chapters downloaded from *EBSCO eBooks* can be opened in any program which is compatible with the file format (.pdf or .epub).

And particular to **Flipster,** please note:

- o The *Flipster* start page and search results pages are delivered on the EBSCO*host* platform, for which a VPAT (Voluntary Product Accessibility Template) is available. At this time, the *Flipster* digital magazine viewer and mobile applications are not fully functional for viewers with visual impairment. Updates that will address accessibility concerns are on the roadmap for the *Flipster* viewer and apps.

EBSCO's goals for continuous improvement on accessibility include:

- Testing EBSCO platforms with several development tools and assistive technologies
- Conducting usability studies with users who have vision and physical impairments
- Working directly with institutions and their users to address their concerns
- Completing regular accessibility audits conducted by a qualified third party
- Training for developers conducted by third party
- Partnering with The Carroll Center for the Blind (Newton, MA) for ongoing technical support, training and user testing

While EBSCO's proprietary search platforms may not completely comply with all WCAG Levels A and AA standards, EBSCO regularly makes improvements and/or enhancements to improve access and usability. EBSCO also constantly works to discover and implement new solutions that make the website user experience as seamless as possible.

Content that comes from certain publishers may also not be WCAG or Section 508 compliant (e.g., PDF files that cannot be read by screen readers). However, EBSCO has been working closely with publishers to help them understand the importance of web accessibility and to have their content more accessible to people with disabilities.

As a show of commitment, EBSCO has created an accessibility page on our website to communicate updates to features and functionality, links to resources and a Contact Us form for questions and

comments about accessibility. To learn more, please visit:
https://www.ebsco.com/technology/accessibility.

Questions and comments may also be directed to accessibility@ebsco.com.

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

As described in EBSCO's response to **Support Requirements, Question 8,** EBSCO*admin* is the administrative module that supports EBSCO products and services. Through EBSCO*admin*, libraries can easily manage tasks related to collection management, interface customization and usage reporting.

EBSCO also supports the varying needs of consortia subscribing to EBSCO services, much of which is facilitated though use of EBSCO*admin*, as outlined in response to **Support Requirements, Question 9**. As part of this, consortium administrators have added rights in EBSCO*admin*, as compared to staff of individual library participants.

5. **Please describe alternate Internet access provision in place, in case the primary connection becomes unavailable.**

EBSCO services are built on an infrastructure designed to be available 24 hours per day, 365 days per year. The EBSCO platform is managed via redundant data centers with diverse routing over multiple gigabit connections to major Internet Service Providers (ISPs) and the Internet2 backbone. The hosting infrastructure within each data center is highly redundant with automated load balancing; fault-tolerant network devices; emergency power generation and Uninterrupted Power Supply (UPS). As a result, EBSCO's service level agreements guarantee a 99.9% uptime, excluding any planned maintenance.

Please also note that the vast majority of titles are available for offline reading and can be downloaded to a computer desktop or mobile device. In the event of any outage (on the library's or EBSCO's end) any titles that were downloaded offline prior to service interruption should be available for the duration of their checkout.

6. **Please describe ability to authenticate via SIP2.**

EBSCO does not currently support SIP2 authentication for any interface.

7. **Can the consortium, participating library, or user configure various screen display formats?**

Personal Preferences
Individual users can set a variety of personal preferences in *EBSCO eBooks* and *Flipster* from the top toolbar. Preferences can include: language, autocomplete (on/off), record display format (standard, title only, brief or detailed), page layout (one, two or three columns), results per page, export and citation format, preferred "sort by" option, export settings, preferred email and more. Selections can be saved to a personal account and configured at any time. Once a user signs into his or her personal folder, personal preferences are applied.

Administrative Configuration

In EBSCO*admin*, administrators can customize various search options at the local and consortium level, such as autocomplete and did-you-mean settings, basic/advanced search defaults, and various options related to facets. For example, administrators can choose from the following Advanced Search layouts: Single Find Field and Guided Style. Additionally, they can easily customize search modes, default search screen (basic/advanced), available browse options, limiters and expander naming conventions, ordering, etc.

Additionally, EBSCO*admin* branding options present an opportunity for customers to enhance the search experience for users by adding convenience and useful interface functionality. They also allow administrators to seamlessly integrate *EBSCO eBooks* into the library's online resources.

For example, it allows for coordination with local library sites, **Flipster** can be branded to include a library logo in the upper-right corner of any screen. This logo can be connected to the library's homepage, catalog, etc.

For **EBSCO eBooks**, administrators can customize the interface with either traditional or enhanced style branding options, including logos, preferred colors, images, custom text, messages and HTML. Logos or library names can also be coded to connect back to the library's own homepage. Using these options, many libraries have created a fully branded profile that provides a seamless experience, making it feel like an extension of the library website, fully integrating with their identity standards and brand style guides.

For a complete overview of all *EBSCO eBooks* branding capabilities, please refer to the table below.

Enhanced Branding Capabilities	
Basic Search	
Library Logo Placement	Select to display your logo above Find Field, or below Find Field.
Library Logo Image	Enter the URL to your library's logo, which will replace the EBSCO logo above the Find field on the search screen.
Library Logo Hyperlink	Enter the URL to the library's home page. When users click this link, they will exit the EBSCO platform and return to your library's web page.
Top Branding (Applies to all pages except Basic Search)	
Library Logo Image	Enter a URL to your library's logo, which will appear to the left of the Find field on the Advanced Search and Result List screens, as well as the PDF Full Text viewer.
Library Logo Hyperlink	Enter the URL to the library's home page. When users click this link, they will exit the EBSCO platform and return to your library's web page.
*Display Top Right Branding Image -OR-	Enter the URL to your library's logo, which will appear on the top right of the EBSCO platform, replacing the Exit button.

*Display Top Right Branding Text	If you are not displaying a library logo, you can enter the library name to appear as static text.
*Top Right Branding Hyperlink	Enter the URL to the library's home page. When users click this link, they will exit EDS and return to your library's web page.
*Mobile Branding Image	Enter the URL to your library's logo, which will appear on the mobile version of the EBSCO platform.
Bottom Branding	
*Bottom Branding	Click the Modify to create a new Bottom Branding version or modify an existing version.
*Bottom Branding Version	From the drop-down list, select the version of branding that you want to display.
*also available under Traditional Branding Style	

8. **Please state the actual hours of availability 365 days per year based on data on system availability during the most recent 12 months.**

EBSCO's web-based, hosted solutions are available for online access 24/7/365. Their end user platforms can also support unlimited simultaneous users. With thousands of customers, serving millions of end users, EBSCO's technical experience in delivering online content is second to none.

EBSCO's commitment is to ensure that the service is available 99.9% of the time per year, excluding any planned maintenance. This equates to no more than 8.76 hours per year of unplanned downtime. While EBSCO operates the service in a manner that is designed to be available 24 hours per day, we do also reserve the right to plan maintenance that would cause downtime. EBSCO shall limit downtime due to planned maintenance to less than 8 hours per year.

EBSCO provides advance notice of scheduled system maintenance, as well as information about service issues, updates and resolution. This information is posted on the System Status page (https://status.ebsco.com/) of EBSCO's support site (EBSCO Connect). Customers may subscribe to the status page to receive email notification of these communications. In the unlikely event that EBSCO requires emergency maintenance, EBSCO will also make all reasonable efforts to provide at least 48 hours' notice to customers via email, as well as an alert on the Support Site.

EBSCO defines a Critical Issue as a full or partial outage of the service such that a customer is unable to use the service as contracted. Critical Issues are very rare. Whether notified of the issue via internal monitoring systems or by customer inquiry, EBSCO will work to restore service as quickly as possible. In the unlikely event of a persistent outage lasting longer than two hours, EBSCO will initiate an email communication to customers alerting them that service is down and will post an alert to the EBSCO Support Site notifying customers of any currently available information (e.g., expected length of downtime and circumstances).

EBSCO has not had a complete service outage in many years. Component outages may be experienced on occasion; in this event, EBSCO system monitoring software and customer satisfaction teams identify, triage and swiftly resolve any causing issues. During triage, the Systems Status page updates customers with initial communication and regular updates.

9. **Please provide data on typical response times experienced by end-users when searching a collection.**

EBSCO's Service Level Agreement outlines our commitment to deliver end-user results in an average of 5 seconds or less. Service traffic and response times are measured against this goal every six months.

Current as of Spring 2019, the Peak Daily Search Click rate hit a high in April, with 5.9 million clicks and over 510 million back-end searches. The peak back-end search rate was 5,905 per second, and Search Click rate was 70 per second. However, despite this high search volume, the normalized average of results time was 3.85 seconds end-to-end, which includes host latency and network latency.

Please note that 'Search Clicks' represents the number of searches initiated, and 'Searches' represents the number of Search Clicks applied to the number of databases/collections searched (e.g., one Search Click may be run against several databases simultaneously).

Due to variations in network bandwidth and service providers, EBSCO has traditionally observed response times to range between 2 and 5 seconds. Additionally, 95% of all user requests responded in less than 8 seconds, including network (customer internet connectivity) times.

EBSCO's **Service Level Agreements** have been attached to this proposal for your additional reference.

10. **Does the respondent allow end-users to transfer titles to non-wifi devices which require a USB or other connection to a computer?**

EBSCO eBooks
The vast majority of titles are available for offline reading. Using the download function, users can checkout and download a title for offline reading in the following ways:

- ✓ On a computer (via Adobe Digital Editions)
- ✓ Within a compatible app (for tablet/mobile users)
- ✓ Directly on a device (for e-readers that do not require an app)

If accessing via mobile device, users will be prompted with compatible apps (if necessary). Further regarding the site's interest in <u>transfer</u> – below is an outline of the process to transfer titles from a desktop to an e-reader:

1. To begin, you will need a supported e-reader and will need to have Adobe Digital Editions installed on their computer.

2. Open your downloaded e-book in Adobe Digital Editions. If you have not authorized Adobe Digital Editions, you will need to complete that step first. An Adobe ID is not required for authorization. Simply select I want to authorize my computer without an ID and click Authorize.

3. Connect your portable device to your computer with a USB cable.

4. Turn on the e-reader. If the reader offers an option to Recharge or Connect to the computer, choose the "Connect" option.

5. Open Adobe Digital Editions – it automatically detects the presence of your device and offers to authorize it.

6. Just as the Adobe Digital Editions software must be authorized, the portable device must also be authorized to be able to transfer protected content to and from the device.

7. Click Authorize Device in the resulting window and then Finished once authorized.

8. After authorization, the device appears as a new bookshelf in your library. Transfer items to and from the device bookshelf by clicking on the book title, then dragging and dropping the title into the device bookshelf.

Flipster

While all magazines are available for online reading in-browser, titles can only be downloaded for offline access into the *Flipster* app, currently available for iOS, Android and Kindle Fire. As noted, the app is available for free download at any time.

The concept of transfer is not applicable, as the *Flipster* app allows users to easily sync checkouts and reading progress across devices. Users simply log into the app using their credentials; they can then quickly and easily find their checkouts, and pick up at their last point.

11. **Please describe the product's compatibility with all major e-readers and operating systems (including Kindle, iOS, Android, and Windows).**

EBSCO offers web-based, hosted platforms that can be accessed through any internet-connected device, including computers, tablets and smartphones. They are compatible with any common web browser and major operating system.

In addition to reading in-browser, many titles can be downloaded offline; some devices and file formats may require use of an app and/or support for Adobe DRM software. Please refer above to **Technology Requirements, Question 10**, for additional detail on supported readers and access parameters.

Training Requirements

1. **Please describe what training materials and live or recorded sessions are available to library staff and consortium administrators.**

EBSCO can work with you to provide an appropriate training plan. Training services are coordinated by our Customer Engagement Services team, which is accountable for worldwide customer training on all EBSCO products and services. The team's goal is to deliver value-added training and direction to help ensure the success of all EBSCO customers.
Currently, the team includes over 40 Engagement Managers who offer world-class training in a variety of delivery methods, all designed to educate users and administrators on the rich functionality of our

products, as well as to help all types of organizations successfully integrate use of these valuable resources into their libraries.

Below is an overview of typical formats, options and resources:

- **Live Online Courses and On-Demand Training**
  EBSCO offers free online courses that provide training and demonstrations for users and administrators on a wide variety of EBSCO products and interfaces. These convenient sessions are offered on a regular basis via WebEx, with approximately 100 sessions scheduled per month. Generally, sessions are 30 minutes to one hour in length, and are designed to be an open, collaborative experience. Trainers not only provide instruction, but also facilitate open discussions with customers – answering questions, offering examples and sharing best practices. Users and administrators can sign up to join the live presentation by going to the training site (https://connect.ebsco.com/s/article/EBSCO-Training). Many of these sessions are also recorded and available 24/7.

- **Customized Online Training**
  EBSCO's Engagement Managers are able to provide customized online sessions for organizations who would like institution-specific training. Virtual offerings can include sessions on one or more topics via WebEx. These can be scheduled for any level of agency personnel, as needed, and can be requested through your site's dedicated sales representative. EBSCO's team has also had success in offering virtual series – encouraging participation in a string of short online classes with a common theme. The WebEx platform features a variety of interactive tools (for up to 200 online participants at a time), including chatting, responding with emoticons, and taking quizzes and surveys, which the trainers use to generate engagement, thereby delivering a true value-added experience for all participants. These sessions can also be recorded, posted and shared for others to view.

- **Support Site Training Tools**
  The EBSCO Connect support site features numerous training options (https://connect.ebsco.com), including recorded and live training sessions, videos and tutorials, trainer guides, user guides, help sheets and much more. EBSCO Connect is available at any time, for all users.

- **On-Site Training**
  The goal of on-site facilitation by EBSCO's experienced subject-matter experts is to educate administrators, librarians and teachers on the interface functionality, the valuable content, as well as the applicability of EBSCO resources in the curriculum and in the library. The format can be hands-on or presentational, as preferred. For on-site training, attendee limits may be enforced depending on room limitations.

If awarded, EBSCO would work with the Montana State Library to design a training program that meets the unique needs of individual libraries and schools. As part of this, EBSCO would be happy to dedicate a team member to assist in all aspects of training:

- **Jason High,** *Engagement Manager*
  Jason High has been with EBSCO since 2017. His primary role as an Engagement Manager is to promote EBSCO resources through training and consultation. Prior to joining EBSCO, Jason studied Peace and Conflict Studies at University of California at Berkeley. His work experience includes technical and clerical positions at the U.C. Berkeley Library (and a brief stint at

EBSCOdoc). He has eight years experience in software technical support helping EndNote customers wrangle bibliographies and eight years experience managing customer training at ProQuest for RefWorks, Summon and other research funding and library resource management products. Jason spent a year working as a contract training manager on a project at Nike before joining EBSCO as an Engagement Manager in 2017. He works from his home office in Portland, Oregon.

2. **Please describe what training materials and live or recorded sessions are available to end-users.**

EBSCO offers complete support and training materials that outline the functionality, options and features of EBSCO interfaces, providing extensive support for end-users and library staff. These items may be found on the EBSCO Connect support site and are provided at no additional cost.

The EBSCO Connect support site is designed specifically for customers, providing detailed support information on all EBSCO products and services. Via the support site, end users and libraries can access a wide range of resources to solve technical issues on their own. This includes advanced knowledge base technology (Frequently Asked Questions), an online support request form (for expert handling by a qualified technical support), as well as links to troubleshooting information, search tips, top stories, instructive tutorials, product and service updates, help sheets and more. It also features a library of step-by-step training tools for key product features, including translations in dozens of languages.

All EBSCO Connect support documentation can be printed on demand and distributed to assist in training initiatives. This includes a variety of promotional resources that can be customized and printed to meet your libraries' individual needs, such as bookmarks, flyers, posters and more. Materials posted on the site are provided in a variety of formats including, but not limited to, HTML, PDF, Word, PowerPoint, etc. If requested, EBSCO will provide copies of/access to support materials for review. Documentation in Word format may also be customized for local use.

Libraries can also print an unlimited amount of user documentation, including support topics, which are updated regularly to reflect product upgrades, enhancements and changes. Major updates are added monthly, and users can access a listing of recently updated documentation at any time. This is accomplished directly from the EBSCO Connect "News" center, highlighted on the home screen.

Customer References

Provide references that are using your specific software solution and/or hosted services. At a minimum provide the name of the entity, contact person, customer's telephone number, email address and a description whether the customer is hosting your software solution in their own environment and/or your hosted services.

EBSCO provides online resources and information services to thousands of libraries across the nation and around the globe, including public libraries, library systems and consortia or all types and sizes. In addition to *EBSCO eBooks* and *Flipster*, EBSCO deliverables include nearly 450 aggregated research databases, language learning software, subscription management services, audiobooks, digital archives and more. With thousands of customers serving millions of end users, EBSCO's experience in delivering online content is second to none.

EBSCO is proud to have had repeated success with projects of similar size and scope to the current solicitation. Please note, all EBSCO products are hosted on EBSCO servers. The following reference contacts can attest to EBSCO's performance and product value:

1. **Consortium Name:** Indiana State Library (INSPIRE)
   Contact Person: Jacob Speer
   Phone Number: (317) 232-3693
   Email Address: jspeer@library.in.gov

2. **Consortium Name:** GALILEO
   Contact Person: Russell Palmer
   Phone Number: (800) 875-3697
   Email Address: russell.palmer@usg.edu

3. **Consortium Name:** TexQuest by TSLAC
   Contact Person: Ann Griffith
   Phone Number: (512) 463-6110
   Email Address: agriffith@tsl.texas.gov

Vendor Pricing for Services Required

Please provide pricing information on the following. Pricing information should include:

- **Annual cost**
- **How cost is generated for each category (e.g. cost/item purchased; hourly rates; circulation totals)**
  - **Content purchasing/licensing**
  - **Hosting fee(s)**
  - **Library consortium fees (costs to add or remove libraries)**
  - **Website upgrade/change fees**
  - **Technical support fees**
  - **MARC record purchasing**
  - **Customization and prerequisite software and hardware pricing.**
  - **Maintenance costs**
  - **Upgrade fees**
  - **Costs to upload/host local content (content not purchased through Overdrive such as local authors)**
  - **Reporting fees**
  - **Training costs**
  - **Marketing costs**

  NOTE: If respondent does not charge for any of the above, please note that in response.

In response to the Montana State Library's primary interest, EBSCO is offering a set of digital library solutions for multi-library e-content services. This includes a core offer of *EBSCO eBooks* subscription collections and *Flipster* digital magazines.

EBSCO eBooks

For *EBSCO eBooks*, we are pleased to present the following subscription collections as a bundled offer. There is no price range, only a one-time annual cost. If purchased by the MSL, these collections could be accessed across *all libraries* in the state:

Item	Cost – Year 1*
eBook Academic Collection	
eBook Community College Collection	$57,810
eBook High School Collection	*Renewal increases would be*
eBook K-8 Collection	*no more than 2% per year.*
eBook Public Library Collection	

Flipster

For *Flipster*, subscriptions are offered on a title-level basis. They are available as an annual subscription, which can be 1 or 2 years, depending on the publication. Subscription start dates are also flexible and include the 1st day of the next three months.

Currently, *Flipster* offers nearly 1,500 digital magazines, with many unique to our collection. Pricing would vary based on the Montana State Library's preferred titles and subscription periods. If purchased by the MSL, titles can be used across *all public libraries* in the state

Below is a pricing link for the *Flipster* collection, with a **50%** discount applied:

https://oi.epnet.com/OIApp/flipster/orderEntry.do?arg=0111-126001700490078012701060-08501200051-0590115-021-071-0720051010100850022001200740-099010600660022-014-0250118-097-058-061-052

About the Cost

Subscription pricing is an annual, all-inclusive charge, with no additional costs for training, technical support or user support. Quotes are based on library type(s) and population size(s), allowing for fair and equal pricing.

The only cost in addition to content is a 5% subscription service fee for *Flipster* titles – an industry standard. Additionally, financial advantages **for both solutions** also include:

- ✓ No platform fees
- ✓ No hosting fees
- ✓ No access fees
- ✓ No delivery fees
- ✓ Complimentary admin modules
- ✓ Complimentary MARC records

EBSCO also does not charge for any training, technical support, user support, user documentation, downloading of any titles, reports generated, etc. As a result, libraries can focus on acquiring the best content for their patrons.

Supplementary Options

In addition to the above state-purchased collections, each library may also purchase e-book, audiobook and digital magazines individually — selecting from the full collection — based on unique preferences and needs.

Outlined below are the additional options, *available on a per library basis, across all markets*:

- **Direct Title-Level Purchase of** *EBSCO eBooks and Audiobooks* **– 1B1U, 1B3U, 1BUU, DRM-Free**
  EBSCO eBooks and Audiobooks may be purchased directly on a title-by-title basis in EBSCO*host Collection Manager* (ECM). The overall collection includes over 1.5 million e-books and 145,000 audiobooks. Purchased titles are owned in perpetuity and therefore, there are no annual charges applied for ongoing access. Titles will only need to be purchased once.

  Title-level pricing is established by the publisher and driven by the chosen usage model. Cost includes no mark up or access fees. If the publisher permits, titles are available at one or more of the following access levels:

  - One Book, Unlimited Users (1BUU)
  - One Book, Three Users (1B3U)
  - One Book, One User (1B1U) *(Only option available for Audiobooks at this time)*

  Purchasing and usage models at the title level are purely at the publisher's discretion. Therefore, for all books that are only available as 1B1U or 1B3U, additional copies can be purchased to meet end user demand – in the same way a library would purchase multiple copies of a print title. To do this, the same cost one-time cost is applied for all additional copies.

  In addition to 1B1U, 1B3U and 1BUU availability, EBSCO recently added more than 190,000 DRM-free e-books to our overall collection. DRM-free licenses allow for unlimited concurrent user access with no restrictions on use – unlimited printing, saving, copy/paste and downloading. Patrons will simply authenticate through their library, with no additional sign-in, to enjoy quick, intuitive access to both PDF and EPUB DRM-free downloads, either for the entire e-book or at the chapter level.

- **Direct Title-Level Purchase of** *EBSCO eBooks* **– Concurrent Access Model (CAM)**
  The CAM business model makes e-books available on an unlimited concurrent access basis, up to an annual maximum number of uses. Libraries can license a title on an unlimited concurrent access basis, up to an annual maximum (typically 365), and receive a new allotment yearly.

- **Direct Purchase of** *EBSCO eBooks and Audiobooks* **– Subject Sets and Featured Collections**
  Subject Sets are pre-packaged collections of front-list *EBSCO eBooks* titles that allow for quick and easy purchase in high-use, high-interest subject areas. Sets are released bi-annually, and only include titles published within the year. There is no title overlap across sets and no title overlap year-over-year – so the library never needs to worry about duplication. Examples of Subject Sets include:

  - Allied Health
  - American History
  - Business
  - Career
  - College Success
  - Computer Science

  - Education
  - Environment
  - Ethnic & Cultural Studies
  - K-8 Literature, Recreational
  - Leadership & Management
  - Legal

- ○ Nursing
- ○ Psychology
- ○ Robotics
- ○ Social Work

- ○ Teacher Resources
- ○ Vocational Studies
- ○ Wellness
- ○ World History

Featured Collections are pre-packaged sets of front-list and midlist *EBSCO eBooks* and/or *EBSCO Audiobooks* titles, organized by library type. Featured Collections allow libraries to purchase content on a broad range of topics within a particular subject area or featured theme. Examples of Featured Collections include:

- ○ 5-8 Lexile Leveled eBooks
- ○ 9-12 Lexile Leveled eBooks
- ○ AAUP eBooks for HS and Public Libraries
- ○ Academic Award Winners Collection
- ○ African American History Collection
- ○ American Indian Studies
- ○ Banned Books
- ○ Children's Picture Books
- ○ Classics as Graphic Novels
- ○ Competency: Coaching & Mentoring

- ○ Diverse Books
- ○ eBook Youth Reference
- ○ Great Business Minds eBooks and Audiobooks
- ○ Holiday Collection
- ○ In Demand eBooks
- ○ Library Journal Best Reference 2017
- ○ Military Personnel and Families
- ○ Women in the Workplace

Both Subject Sets and Featured Collections can be purchased in their entirety or in part. To browse available collections, please see EBSCO*host Collection Manager*.

- **Demand-Driven Acquisition (DDA) of *EBSCO eBooks and Audiobooks***
  Library administrators can also choose to create Demand-Driven Acquisition (DDA) lists, which allow the end user population to select titles for purchase. DDA title lists can include e-books with various user licenses (1B1U, 1B3U, 1BUU, DRM-Free). They can then be exposed to end users without immediate purchase. A title on a DDA list is triggered for purchase when a patron directly accesses the title, guaranteeing that only those titles with usage are purchased. Once a title is triggered, it is owned in perpetuity.

  Additional DDA options include Short Term Loan and Loan-to-Own models. With Short Term Loans, administrators can grant users temporary access to titles, while only paying a fraction of the list price. Short Term Loans are only available via DDA collections, in 1, 7, 14 and 28-day increments. Loan-to-Own allows your institution to calibrate a DDA, so that a title is purchased after it experiences a certain number of loans (1-10, per administrator settings in ECM).

- **Direct Title-Level Purchase of *Flipster* Digital Magazine Subscriptions**
  In the same way the Montana State Library would purchase *Flipster* subscriptions, title-level annual subscriptions are also available on a per library basis. Usage models are predetermined by the publisher, ranging from 20 to 5,000 and unlimited simultaneous users (per issue). However, the vast majority of titles are offered with unlimited access. Individual libraries can purchase their own titles and build collections that meet unique, individual needs. Individual title pricing is further based on population size, allowing for fair and equal pricing across libraries.

About EBSCO*host Collection Manager* (ECM)

Regardless of format or preferred usage model, all content can be selected and purchased individually via **EBSCO*host Collection Manager* (ECM)**. As the online ordering portal and catalog for digital books and magazines, ECM is a robust, yet easy-to-use tool for searching, selecting and ordering electronic titles.

Overall benefits of ECM include:

- ✓ Easy ordering and fast delivery of titles to end users
- ✓ Designated Selector and Approver accounts, to separate subject matter experts and buyers
- ✓ The ability to explore titles with basic or detailed searches
- ✓ Browse by category, pre-made collection, recently added and more
- ✓ The ability to sort results by relevance, publisher, price, etc.
- ✓ Convenient reporting capabilities and stock management
- ✓ Simple payment and shopping tools for easy collection development
- ✓ Detailed bibliographic information and samples for each available title
- ✓ Helpful alerts that can be used to notify users of new content matching their criteria

Regarding individual pricing, please note:

- Pricing is set on a title-by-title basis and easily reviewed on-platform, via universal shopping cart
- As outlined above, all content is available with no platform, hosting, access or delivery fees
- While EBSCO cannot provide additional discounts on purchased e-book or audiobook titles, it is important to note that EBSCO pricing reflects publisher-established cost, with no mark-ups

EBSCO can create ECM accounts for all interested libraries, so they may customize their collections and subscriptions as they see fit. To request a free trial, please visit: https://ecm.ebscohost.com