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Building a Discovery Tool RFP: a compilation of unique components and duplicative ILS RFP data.

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Building a discovery tool RFP: a compilation of unique and duplicative ILS RFP data. Lisa Smith, MLS, Deputy Director, Gibson D. Lewis Health Science Library, University of North Texas Health Science Center, Fort Worth, Texas; Lisa Clark, Texas Woman's University Library and Information Studies, Denton, Texas.

Who we are:
The University of North Texas Health Science Center is located in Fort Worth, Texas. The University is comprised of four schools: The Texas College of Osteopathic Medicine, The Graduate School of Biomedical Sciences, The School of Health Professions and the School of Public Health. The Gibson D. Lewis Health Science Library supports the education, research, patient care, and community service goals of the University.

Project rationale:
The library has utilized the innovative Interfaces Millennium ILS system for 9 years. The proliferation of competing Discovery Tools, ILS products and Open Source Systems led the library to analyze current products within the marketplace to determine their relevancy and applicability for our existing patron groups.

Method:
The UNTHSC Library began analyzing the Discovery Tool and ILS products available on the market in February 2010 to determine if a system migration should be considered. The project consisted of reviewing the literature to determine if it was determined by unique ILS-RFP, reviewing RFP best practices literature contributed from the library community and reviewing vendor demonstrations of Discovery Tool Products.

Results:
A Discovery Tool RFP was devised that included relevant components suggested in the ILS-RFP literature coupled with components unique to Discovery Tool Products. The resultant RFP integrated data from the broader systems procurement literature.

Conclusion:
A well-constructed Discovery Tool RFP may provide a framework for vendors when submitting bids to solicit university business and can serve as a guidepost for library staff when analyzing the current specifications of existing systems. Building the RFP aids system migration committee participants in carefully analyzing existing systems and determining unique components of a Discovery Tool, while helping committee members become more educated about the library’s needs and relevant Discovery Tool features offered by vendors.

Peripheral benefits of building an RFP:
- Provides a checklist for library staff when analyzing the existing system performance
- Helps staff prioritize system specifications/functionality
- Increases staff awareness of existing system features & future system capabilities
- Increases staff knowledge of current vendor products
- Increases staff knowledge of existing library system architecture

Standard RFP development guiding principles:
There is extensive literature describing RFP best practices and guidelines for constructing well-defined RFP. Many of the recurring themes, assumptions and guiding principles found within the literature are summarized below.

- Functionally mature product market = shorter RFP (no need to point out the obvious)
- RFP’s don’t have to be exhaustive in listing function details. Shorter weight lists can lead to a more effective, decisive and less time consuming analysis.
- Vendor supplied RFP’s don’t utilize, too biased!
- Well crafted RFP’s serve to [1]:
  - Increase decision making objectivity
  - Enable direct comparison
  - Reduce organizational risk
  - Increase final contract efficiency

Discovery Tool RFP: functional requirements component:
While the standard components of an RFP remain relatively consistent across bidding organizational systems, the functional requirement sections contain the most detailed, product specific component of the RFP. The core ILS-RFP requirements from 9 is can easily be transcribed into a Discovery Tool RFP with the exception of the functional requirement sections.

Two common approaches to describing functional requirements include requirements expressed as:
1. Required listing of system specific functionality required.
2. Listing of questions and topics (a more open-ended questionnaire) that must be addressed by each vendor

A detailed overview of items to consider for inclusion in the ‘requirements’ section is noted below.

- Indexing Features
  - Type index (default, unified or hybrid)
  - Index Metadata harvesting sources (internal library databases; external database vendors)
  - Indexing of content of subscribed/distributed databases? List databases available for indexing
  - Mechanism of how databases are loaded into the Discovery Service (ex: Catalog, institutional archive)
  - Frequency of indexing, updates to index
  - Frequency of harvesting of database content, who determines the frequency (vendor or library)
  - Guideline features
  - Content pre-harvested into unified search index from commercial databases
  - Vendor affiliated database indexing techniques (unified index components, which databases are indexed in the core unified index)
  - Unified Index Construction (how is content provided/obtained by vendors)
  - Federated searching of databases not affiliated with the bidding vendor (vendor specific solution or one of the existing systems)
  - Indexing granularity (bidding vendor producing database indexing technique in lieu of other subscription databases)
  - Optional indexing — provider’s advanced indexing available for which databases/products
  - List of metadata providers (example: LexisNexis); List of provider metadata tags searched

- Other Library Applications
  - Federated searching
  - Discovery Tool Vendor databases searched
  - Other Library Applications
  - Federated searching vendor under contract to provide future data
  - Frequency of database releases provided in ‘basic’ subscription package (when are additional user fees incurred for adding databases)
  - Compatibility with which ILS systems (i.e., which systems offer enhanced functionality)
  - Institutional Repository Search capabilities
  - ILS features searched (ex: Core Functions); must be the ILS module be produced by the bidding vendor to be searched)

References: