Building a discovery tool RFP: a compilation of unique and duplicative ILS RFP data.

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Who we are:
The University of North Texas Health Science Center is located in Fort Worth, Texas. The University is comprised of 4 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 Interface Meta-Bibliography RFP system for 5 years. The proliferation of comparing Discovery Tools, ILS products, and Open Source systems has lead the library to compare current products within the marketplace to determine their relevance and applicability for our existing patron group.

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 researching the Library literature to determine if library data is contained into unique ILS RFPs, researching 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 concepts 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 while allowing libraries to solicit university business and can help staff understand vendor production. Further, the resultant RFP aids system vendors when submitting bids to solicit university business.

Business Community RFP trends / suggestions:

Keep the functional specifications component simple.

Consider using creative briefs to help build the RFP Objectives section.

Ensure the product's target audience needs are addressed in the functional requirements section.

Include specific legal and operational requirements that can help minimize risk.

Identify the product customer base.

ILS customer base: Libraries, Library Staff and Patrons.

Peripheral benefits of building an RFP:

Provides a library checklist for 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.

Functionality may mature product = shorter RFP (no need to point out the obvious)

RFPs don’t have to be exhaustive list of functional features. Shorter weighted lists can lead to a more effective, decisive and less time consuming analysis.

Vendor supplied RFP’s do not utilize, too biased!

Well crafted RFP’s serve to [1]:

• Increase decision making objectivity

• Enable uniform direct comparisons

• 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 requirements, the functional requirements section contains the most detailed, product specific component of the RFP. The core RFP contents from ILS can be easily integrated into a Discovery Tool RFP with the exception of the functional requirements section.

Two common approaches to describing functional requirements include requirements expressed as:

1. Itemized list of specific system 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:

• Index type (keyword, subject or hybrid)

• Index/database harvesting source (Internal Library databases, external databases)

• Indexing of classified/subclassified/distributed/union list databases available for indexing

• Mechanism of how databases are loaded into the Discovery Service (ex: Catalog, institutional archives)

• Frequency of indexing, updates to index

• Frequency of harvesting of database content, who determines the frequency (vendor or library)

• Guidelines for database contributions/queries

• Content pre-filtered into unified search index from commercial databases

• Vendor affiliated database indexing technique [unified index components, which databases are indexed in the core union index]

• Unified Index Construction (how is content provided/obtained by vendor)

• Federated searching of databases not affiliated with the bidding vendor (scope or all vendors for other systems within existing environment)

• Indexing granularity (bidding vendor producing database indexing techniques in lieu of other subscription databases)

• Optimal indexing — pre-filter [advanced indexing available for which databases/products]

• List of metadata providers [example: LehighList]; List of provider metadata logs searched

Standard Support / compliance:

1. Standards Supported

• MARC, Dublin Core, FRBR, Z39.50, OAI, etc.

• Accessibility Compliance (W3C’s accessibility Guidelines)

Database / Content composition

1. Databases Indexed

• Locally Subscribed databases

• Discovery Tool Vendor databases searched

• Other Library Applications

• Databases available on non-subscribed databases

• Library applications (external repositories) working on library's repository

• Library Information Systems & Applications Inventory (verify integration of vendor's product and technology into transactional components)

• Search functionality invariance - Premier Search Functionality available for which vendors

• Other database vendors under contract to provide future data

• Core number of databases provided in basic subscription package (when it includes high frequency for adding databases)

• Compatibility with all ILS systems (i.e., which systems offer enhanced functionality)

• Institutional Repository Search capabilities

• ILS features searched [where Core Features exist]; must be ILS module be produced by the bidding vendor to be searchable]

Search features:

1. Basic search mechanics

• Federated Searching

• Speed (rate of results returned)

• Search method

2. Results display

• Full text filtering

• Relevant results

• Relevance ranking

• Display in linear format

3. Results output

• Duplicates de-duplicated records

• Local content prioritized in display hierarchy (y/n)

• Relevancy ranked items

• Boosted results from ILS

• Article Abstracts

• Presentation of other vendor’s data, how is it displayed

Interlibrary Customization:

1. Branding with Institutional Graphics Logos

2. Customizable toolbar

3. Toolbar color choices

4. Intuitive navigation

5. Tagging feature

6. Choice of facets

7. Availability of skins (how many)

Record Management:

1. Paper to Electronic: Conversion services

2. Link-Resolver compatibility (vendor neutral y/n)

Web 2.0 Functionality:

1. Tagging available

2. Widget integration

3. Linking to online course development software (ex: Blackboard)

4. Popular choices features (ex: your library recommends)

Additional questions concerning vendor affiliation, product maturity and future development product should be included in the Discovery Tool RFP section.

Vendor specific questions include:

• What other products are developed by the same parent organization or affiliated corporations?

• What is the current version of the product being reviewed for purchase? How many times releasing versions exist?

• What is the average annual number of major product releases for this product?

• What modules and functionality are currently under development related to this product?

References:


Bibliography:


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