ER&L. Highlights of OpenRFP’s web service toolkit for RFP preparation and evaluation. Putting procurement issues in perspective.
Overview

- OpenRFP: from discovery to purchase
- Ringgold: who are we?
- Purchasing issues
- e-Procurement
  - Request preparation
  - Vendor responses
  - Evaluation/Decision
- Recap & Questions

OpenRFP is a marketplace: We are not consultants

OpenRFP represents part of the new, Web-enabled marketplace paradigm. Vendor and product information is maintained in a database and presented in a structure designed to help librarians discover new technical products, such as open source ILS, ERM, Repositories, and RFID. When the library decides to begin a procurement process, it can formulate a Request for Proposal (RFP) or a Request for Information (RFI) on OpenRFP. When the library releases the request, the vendor logs on to OpenRFP and applies the database of product information to create a draft response, edits and releases the response. The library can then compare and evaluate the vendor responses online at OpenRFP.

OpenRFP is a branded service of Ringgold

The principals of Ringgold are librarians and IT professionals, each of whom has had over 25 years of experience in automation and information processes for libraries. We began developing OpenRFP in late 2003 and have provided procurement support to libraries in the USA, UK, Australia and Sweden. OpenRFP’s goal is to improve the procurement of technical products through structured, clear, communication between suppliers and libraries such that purchasing of software and other technology is more clear, more accurate and more simple. OpenIdentify, another of Ringgold’s services, provides common institution identification to eContent publishers, their agents, and libraries, to support a more efficient electronic supply chain.

Purchasing Issues:

ILS and other software vendors try to “control their messages”, steering potential
Ringgold Homepage

One of our goals is to bring product and marketing information from Library suppliers to Library buyers.

We do this for publishers as well as for technology companies.

Programs are based on Internet web-services.

We publish Biblio-Tech Review, a monthly, international online newsletter about library automation, available FREE.

We publish Serials eNews for the UKSG (UK Serials Group), a library and information industry online newsletter covering issues related to journals and other eContent. (This is done by contract with UKSG and is available to NASIG members also (No. American Serials Interest Group.)

OpenIdentify. Ringgold audits journal publisher subscriber records to tie them together according to their organizational components, linking, for example, a public library to its city or county authority. The hierarchic database of these relationships totals more than 90,000 records worldwide. Ringgold is actively improving the supply chain for serial publications and its Pilot Project work has contributed to the NISO decision to create a standard for institutional identification—for libraries this means the identifier would become part of the serials order, claiming, and payment process, being incorporated into the software of ILS and ERM companies.
Purchasing Issues:

What is this context where supplier meets librarian? First you must recognize or discover there is something of value to your library. Upon discovery, you learn more about it, perceive its value, and it gains momentum for you to budget and acquire—purchase software, for example, that will improve your work processes or services to patrons.

Ringgold supports discovery and learning by taking the language of the supplier and rendering it into simple functional statements than can stand the test of contracting language: a simple “yes”, “no”, the product does this or does not do it. We eliminate subjective, weasel words like “easy-to-use”, “fast”, etc., when describing functionality. Once you have verified functionality, it can be matched to other mission-critical aspects of purchase, such as cost, vendor reputation and support, the importance of standards, implementation strategies, etc.

Decision-making can be thought of in terms of a listing of factors involved in which product to buy: the most important to the unimportant, with consideration of those things that might be “nice to have.” Leading to…

…Confident purchasing, backed by factual information:

The final goal is to “buy with confidence”, knowing you have made the right decision.
OpenRFP homepage: departure point for using OpenRFP’s web service, discovery or preparation of the RFP.

Security:

Users have passwords and web activity is encrypted. Both vendor and library information is held in confidence, and released under their respective control. The security system allows them to share information openly or to specific recipients. For example, a vendor can allow the library to view its responses to all of the functionality. The library can choose whether to involve specific vendors while it is developing its RFP!
The system supports searching in various modes to enable users to discover specific functionality and selectively to view vendor responses (where the responses are allowed to be “open” or where vendors have granted permission to the specific user login to view responses.)

Example - Search keyword: “Standard”
At least 73 “hits” for “standard”, suggesting many descriptive statements applicable to the various standards affecting library software. The asterisk (*) is a wildcard designation; the search will also pick up “standards” (plural) and “standardization”.

Toolbars:
Users can also do Browse searching by Function, or Product, or Standards as a functional grouping.
Search:
In this Browse search for Standards the displays for selecting functions, products or vendors, and specific responses become more extensive.

Search: Reviewing results.
Selecting a function from the structured list in the center column: select number 2 of 48 items.

View the full Functional Description (upper right). Product details of participating vendors can be selected and are shown in more detail on the next screens.
Browse Search: Integrated Library Systems
OPAC Module
Vendor & product detail

Library can see product status with most currently available information; vendor public notes are optional.
Vendor information:  Short description
The vendor maintains control over one’s corporate information.  Vendors have secure logins to maintain their information.

Company detail behind the links:
W  =  Link to vendor Website
Envelope = email address
P  =  Link to Vendor’s Product information
More  =  Full detail about the vendor in a separate window
O  =  More detail about the vendor
Vendor Product descriptions:

**Product Description**

**Products**

| VTLS Inc. | 
| --- | --- |

**Fastrac**

VTLS Inc. has combined RFID technology with over years of experience in meeting the needs of libraries around the world. The Fastrac Circulation Management System has been designed to anticipate the flexibility, budget, growth, and security issues challenging libraries in the future. Efficiencies and features are built-in to reduce staff workload by processing more items in a shorter period of time with fewer steps than traditional barcode circulation.

**Virtua ILS**

Standards-based, fully integrated, flexible, and open, Virtua ILS (Integrated Library System) is all this and more. With visionary features like PRER (Functional Requirements for Bibliographic Records), Update Notifications through SOL, User Reviews & Ratings, and a Smart Device interface to the catalog, Virtua sets a new standard of excellence for the library world. Providing full multilingual support and leveraging a solid Oracle foundation, Virtua is designed for libraries that expect more than meets the eye.

**VITAL**

VITAL is an institutional repository solution designed for universities, libraries, museums, archives and information centers. This software is designed to simplify the development of digital object repositories and to provide seamless online search and retrieval of information for administrative staff, contributing faculty and end-users. VITAL provides all types of institutions a way to broaden access to valuable resources that were once only available at a single location and to a finite number of patrons. By eliminating the traditional limitations information seekers encounter, this technology grants access to materials for all authorized end-users, from professional researchers to recreational learners.
Vendor Product Detail:
Vendors can make public comments to clarify product status or that help in understanding the a functional description. The system also handles vendor comments designated as “private”.
Library creates RFP
Establish RFP information, including, description, release date, participating vendors, staff login and security controls, etc.
Library selects and assigns importance to functions:

Functional statements become specifications by the Library’s assignment of the level of importance.

Processing steps:
1. Select module. (Screen example is OPAC)
2. Determine if the Functionality will be included in the RFP.
3. Rate the importance level of the Functionality. (From “unimportant” to “most important” in 6 options)
4. Flag “Demo” if the Vendors will be required to demonstrate the Functionality.
5. Track the Library’s internal status for completing the response document (more than a single person can be involved in determining the importance rating of a function, until the status becomes one of “completed”.
6. Green check indicates each Functional Description is now complete.
Vendor response:

Upon release of the RFP, and as a parallel function for the library’s selection of specifications, the vendor has a similar template or workform for responding online to each library specification. In this example of a completed response, note:

1. Green circle dot indicates the vendor response is “Complies” with the requirement.
2. Vendor has added an explanatory note (red arrow) to the response.

Also note in this example of a specification regarding the FRBR standard (Functional Requirements for Bibliographic Records). OpenRFP has incorporated the NISO documentation for applying standards to the language of RFP development. The official publication is entitled: “The RFP Writer’s Guide to Standards for Library Systems”, originally published by NISO Press in 2002. OpenRFP monitors NISO developments for new standards.
RFP Response review:
Library view of a vendor response. The system supports displays of vendor responses in templates similar to library selection & vendor responses to individual specifications. Search filters help the Library to organize responses into review categories to check for validity.
Establish weights for awarding points among Modules.
The Library assigns relative weights to each ILS module. These weights can be modified later in the evaluation stage. They also can be shared as information to vendors to show the Library’s overall requirements.
Library weights the relative importance of each of its specifications. For each function statement the Library selects, it assigns a relative level of importance. One way to think about this is to regard the items that are truly critical to your operation as if they “must” be available—these would be assigned an importance level of “Most Important” and can be assigned weights so extremely high that in the valuation, without these critical functions and corresponding high scores, the vendor will score lower, sufficiently to be disregarded. Knowing which things are important to the Library enables sorting within the specifications with corresponding weights and scores. The Library controls all of its weights in the importance rating scale.
The Vendor response categories are also weighted. Response weightings cause application of evaluation points to the Vendor’s response to product status for each Specification. The Library has numerous options in applying this aspect of the scoring. For example, one’s attitude might be that unless the vendor currently “Fully supports” or “Exceeds” the functionality, there should be no points given. However, by allowing for award of points for other stages of product development, the Library can give consideration to newer products; e.g., open source software, newer applications (ERM) coming into the market.
Other evaluation factors:

Libraries consider more than just Price and Functionality, for example, Customer Support and References. Using the scoring factors in the prior tabs, OpenRFP can automatically calculate the scores for Functionality, but assigning scores for Cost and the other factors is up to the Library.
Evaluation reports: Scoring comparisons among the Vendor Products. Product identification has been “masked”. While studying and reviewing details of the vendor responses, scores weights for the various responses, importance levels, and module comparisons can be altered by the Library. This shows the Library the degree of difference among the products.
Module scoring:
Reports include ranking of Product Responses by Module, showing the Vendor scores. In this example, vendor names disguise the procurement. Scores of the highest ranking product have a yellow background to highlight their positions.

The Library can do detailed “reasonableness” and “sufficiency” testing to verify results. For example, the library can change the response weightings and re-score the results to determine if the vendor rankings change. The library can also look at the relative differences between two vendors where their scores are very close but there are major pricing differences.
Summary:

1. OpenRFP is designed to support libraries and vendors with more efficient purchasing. This is now possible because of the speed and accuracy of the Web.

2. In addition to using OpenRFP for more efficient competitive procurement, libraries can also use it to justify a “directed purchase” when the capabilities sought are unique.

3. The OpenRFP process is transparent and staff can be clear that their needs are represented and that the chosen product meets them. Implementation success is further bolstered by everyone feeling: “This is the best choice for our needs.”

4. Users of OpenRFP have consistently praised the process, declaring that they can purchase efficiently and with confidence.
Questions and comments are welcomed. Web demonstrations are available and designed according to your specific interests. Contact me.