RFPs: a necessary evil or indispensable tool?

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Abstract

Purpose – The purpose of this paper is to assess attitudes amongst librarians and system vendors towards the use of the Request for Proposal (RFP) process for selecting a library management system; and to use the results as the basis of recommendations for best practice.

Design/methodology/approach – A focus group of librarians and a focus group of system vendors were asked open-ended questions. Similar groups answered quantitative questions through an electronic survey.

Findings – Librarians and vendors both found some value in the RFP process provided it was done well.

Practical implications – Best practice is recommended in three aspects of the RFP process: communication, preparation, and documentation.

Originality/value – No previous research has assessed attitudes to the RFP process amongst librarians and vendors, and compared the results.

Keywords Library automation, Purchasing, Information management, Library management, Knowledge management systems

Paper type Research paper

Introduction

One of the most important decisions for the library manager is the selection of a library management system (LMS) and most will do it at least once in a career. The profession abounds with stories (some true, some apocryphal) of disastrous system choices and of how easy it is easy to be swayed by a smooth-talking sales representative, especially for those managers have little previous experience of systems or of capital item purchasing. Faced with the need to replace an aging system some library managers can be more than a little unsure about how to select the best system for their organisations. As a result of lacking knowledge of the software itself, and not being sure how to go about choosing the best package, some librarians fall back on the "sheep syndrome" of purchasing what other librarians have bought, even though the software may not be the best choice for their library. It is axiomatic that library managers must make good objective decisions based on hard data and the ability to compare apples with apples, though in practice it doesn't seem to happen that way as often as it should. Undertaken properly, the RFP (Request for Proposal) process allows library managers to do this, and the authors of this article investigated best practice in writing and using an RFP.

Both authors of this paper have experience on both sides of the RFP process, as library managers selecting an LMS and as vendors responding to RFPs from libraries. In both situations there is an enormous amount of work and effort, and if not done properly it can be a very expensive exercise for either or both parties. The authors initially questioned whether the RFP process was the best way to select an LMS, and whether it was worth all the time and effort that had to be put into it. Barcia has warned that "at worst, they take on a life of their own" and can prevent the selection of the most suitable system (Barcia, 1999, p. 24). From the other side of the process, Care said "Speaking now as a software vendor, I can tell you that there is a collective groan throughout my organization when one of these weighty documents thuds on my desk" (Care, 1998, p. 54). Duck (1998) goes even further and suggests abandoning the process. So if both parties in the process can regard it with significant doubts, is it really worth the bother? Having completed the study and listened to the comments of librarians and vendors we have come to the conclusion that, yes, the RFP process can be a very effective way to select an LMS as long as it is undertaken carefully and is done as an integral part of the whole selection and implementation process.

The primary question posed was about attitudes among librarians and vendors to the use of RFPs. What did they find useful about the RFP and what did not help them? What do they believe works well in practice and what does not? What suggestions can they make for improving the process? Although some of these questions have been raised before, no other research asked librarians and vendors the same questions to reach a balanced view of best practice.

What is an RFP process?

An RFP is a Request for [a] Proposal and can be part of the selection process of any major capital item or even a service. It is especially useful when the specifications for the product or service can be stated clearly. Librarians may use an RFP when seeking suppliers of software, hardware, books, shelving, photocopying, and even cafeteria services. Library managers have long used it as a tool in the selection and implementation of new library management systems. It is not a contract tender document but can be used in place of one, and it is this application of the process that often causes misunderstandings and if not carefully managed can result in a purchasing decision that may not necessarily be the correct one for the organisation. This paper refers to the RFP process. The actual document is only a part of the whole process that begins from the decision to investigate the purchase of an LMS through to the final selection decision and post implementation follow-up procedures.

RFPs should not be confused with RFIs or other similar pre-selection documents. If a library simply wants to test the market, without making any firm commitment to purchase, then it can do so using an RFI (Request for Information), a less formal document that can be used to find out what is available and it may or may not lead to the next stage of selecting a system. An RFQ (Request for Quotation) does much the same but focuses on costs.

Literature

Librarians seeking a detailed guide to the RFP process should still refer to Boss (1994), which presents a template approach to writing an RFP, though the author has also added a sensible commentary as well. Manifold (2000) has taken a rather different look

at the RFP process, for he favours what he calls a "principled" approach, meaning he prefers to go back to essentials and proceed from there, rather than become too closely involved in the minutiae of each clause of the RFP. In practical terms both are useful to the library manager unfamiliar with he RFP process, though even someone who has been through the process before is likely to find something relevant in both papers. The other major work is Wilkinson and Thorson's monograph (1998), which treats the RFP process as a competitive procurement process for almost any kind of capital purchase, though little attention is given to computer systems. The majority of the book is devoted to purchasing books and serials, especially through approval plans. Relatively little attention is given to the vendor side of the process, but it is a valuable reference for those librarians who are interested in more detail on planning and writing the RFP document.

Methodology
There were different aspects to the research problem. Some of the questions were about the beliefs held by librarians and vendors about the value of the RFP process, so this was best assessed with qualitative methods and the choice made was to use focus groups. Some questions were about the extent of use of RFPs, the time it took to write them and respond to them, etc. Such questions could be dealt with quantitatively by means of an electronic survey, though it should be said that the number of respondents to the questionnaire was not enough to establish

Read formed two virtual focus groups: one made up of librarians who had recently undertaken or were currently going through an RFP and system implementation process; and a second group of system vendors who were regularly responding to RFP documents from librarians. General questions about the RFP process were used to generate comments on a wide variety of issues. She also conducted a short electronic survey of librarians and vendors to collect some simple quantitative data.

The data
Results from the focus groups
What are the main reasons for using the RFP process? Here is what the librarians said in their focus group.

The RFP process:

- Provides a focus for the project – it requires the library to define and prioritise its needs – there needs to be a full understanding of the project from both the technical and business perspective

- Assists in management support and buy-in, and therefore funding of the project – a good RFP process demonstrates responsible fiscal management based on best practice processes and fully informed decision making

- Provides a solid foundation to base a more rigorous investigation of the responding vendors for short-listing

- Can provide the basis of better pricing through the competitive nature of the process (though system selection based on the price of the software alone is usually a mistake)

- Reduces risk by minimising the possibility that important system deficiencies or vendor shortcomings will be overlooked

- Increases vendor participation as it demonstrates that the library is serious about purchasing a new system, Therefore the vendors are more inclined to ensure full cooperation in the process
- Provides contract protection as it should be included in the contract documentation, if the functionality and service levels promised in the response to the RFP are well documented
- Can help staff buy-in/ownership to the selected system by having them participate in the development of the RFP and the ensuing selection process
- Is a vehicle for transparent and sound business processes and decision making
- Raises staff awareness of best industry practices and new technologies
- Forces staff to identify features wanted for a new system
- Can identify areas in the infrastructure, business processes, training and culture where issues need to be addressed
- Obtains the maximum utility at the best price for the final product.

What are the reasons for using the RFP process? This is what the vendors said in their focus group.

The RFP process:

- Provides very useful information to develop a proposal.
- Provides a forum for dreaming and wishing that can feed into the vendors' development processes.
- Provides customer understanding the LMS options in the market-place.
- Enables libraries to evaluate vendors as potential partners.
- Is equitable because all vendors have a chance to submit their product for consideration.

Results from the questionnaire
Read also administered an electronic questionnaire to a group of librarians and vendors. In total, 11 librarians throughout New Zealand and Australia responded to Reed's very comprehensive questionnaire and all sectors were represented, although 8/11 respondents were from academic libraries.

The responses from librarians showed that:

- 8/11 librarians were in favour of the RFP process – if done properly!
- All except one developed the documentation in-house, some with expert advice.
- There seemed to be a reluctance to use external consultants although the one that did use a consultant found it very valuable and would use a consultant again to undertake the process.
- Most used other libraries' documents as a basis to develop their own.
- It is time consuming – a conservative average was that the process took 76 hours.
- Average number of RFPs sent out = 8.
- Average number of responses to an RFP = 5.

- 9/10 used the RFP document in the final selection process – (note that one respondent had not got to the selection stage at the time of the survey).
- 6/10 said they used the RFP documentation to form part of the contract documentation.
- 8/10 used their RFP documentation to measure selected vendor's performance prior to the final sign off of the contract.
- 8/10 said they would use the RFP process again if needing to replace their library management system.
- 9/11 libraries undertook a pre-selection process.
- 6/10 used weighted criteria to evaluate responses.
- 9/10 were able to clearly identify vendors to a shortlist.
- Libraries usually short-listed 2-3 vendors.

Eight vendors were sent a questionnaire and six responded.

- The number of RFPs received per annum varied between 10 and 180.
- The time spent on responding to an RFP depended on complexity, and could be anything between 30 and 100 hours.
- The costs of responding to an RFP estimate were up to NZ$10,000.
- An average of 70 percent of responses get to the shortlist stage.

Putting it all together. What have we learnt about the RFP process?
The RFP process can be very time consuming and expensive for both the library and the vendor alike. If RFPs are not used properly they can waste an enormous amount of time and money.

The main three goals of a good RFP identified by Muller (2003) can equally apply to selecting the vendor of an LMS and will provide the library with the following:

(1) A consistent set of vendor responses, which are narrow in scope for easy comparison.

(2) A formal statement of requirements from which contracts can be written, and against which vendor performance can be benchmarked.

(3) A mechanism within which vendors, fostered by the implied competition of a general solicitation of bids, describe their terms and conditions.

He goes on to say that a properly written RFP and carefully managed evaluation process can accomplish all of these goals. However, the RFP should not be so rigid that it locks out vendor-recommended alternative solutions that may be more efficient and economical. At the same time an overly broad RFP that invites vendors to propose whatever is the optimum solution every step of the way is essentially no RFP at all. Such an open-ended approach is more appropriate in an RFI rather than an RFP. An overly broad RFP makes it very difficult to make objective comparisons between the responses so it runs the risk of being challenged by unsuccessful vendors, which can result in more time and effort being expended.

What can go wrong and what does go wrong
They always say that hindsight is a wonderful thing, and the wise manager will use it when appropriate. One of the most valuable learning tools we all have is seeking an understanding of what went wrong and why. There were two questions in the questionnaire sent out to librarians that were aimed at finding out some of the things that went wrong during with the RFP process, and some things that could have been better. Results to these questions included:

- Lack of key stakeholder support/sponsorship.
- Underestimation of time, effort, and the cost of the process.
- Poor communication / lack of project visibility.
- Lack of staff understanding / buy in to project.
- Lack of end-user participation in the selection process.
- Poorly written documentation.
- Lack of good project planning skills among the library team.
- Little or no needs analysis undertaken.
- Casting the vendor net too wide, adding to time and cost.
- Little or no market research undertaken before the RFP sent out.
- Library staff taken in by "sales hype".
- Loss of flexibility due to government requirements.
- A consultant had too much control over process.

Three keys to success
From all the responses to the questionnaire it was possible to identify three clearly identified keys to a successful RFP process:

1. Communication
It seems to be stating the obvious but it cannot be emphasised enough that without good communication – upwards, downwards and sideways – even the best-prepared project is doomed to failure. Success factors that respondents identified around communication were:

- Getting and keeping top level support – a good project sponsor can make a huge difference to the outcome.
- An implementation steering committee with appropriate representation from all stakeholders.
- Getting and keeping staff buy-in/ownership through meaningful staff consultation.
- The development and implementation of a communication strategy for project at an early stage, ensuring that all stakeholders are kept informed throughout the project.
- Finding champions in each area.
- An open process in which initial documentation is made available to all staff and which alerts staff when new information becomes available.

- Developing a good rapport with the vendors. This was said from the vendor's side, "By sharing your time frame, budget, approval process, and high-level decision criteria, you can obtain the resources to apply to your business more easily. In short, you become 'qualified' (Care, 1998, p. 540).

Communication factors identified by the respondents that led to (in one case total failure of the project) or in most cases problems included:

- Failing to get and keep staff buy in.
- Lack of consultation with stakeholders – a modern LMS can be configured to the point that the look and feel is controlled directly on the end-user's workstation, so users (staff and customers) must be included in the process from start to finish (Manifold, 2000).
- Failing to get or listen to expert advice.

2. Preparation
The more effort managers put in at the beginning of the project, the less work there will be to do later on, and the more likely the library will get a good result. Getting a strong understanding of the organisation's needs is an essential right from the start. This point emerges again and again, that one of the most useful aspects of the whole process is that it forces the organisation to sit down and quality the particulars that are important to them in selecting the new system (Barcia, 1999, p. 25). Greenbaum (1997, p. 1) is even more forceful when he talks about the Big Lie – by which he means that an organisation has failed to reconcile conflicting internal interests, so it decides to use an RFP to shift the responsibility to an outside agency, in this case the LMS vendor. He suggests that organisations can solve the Big Lie problem by better change management, and if that clarifies the real needs of the organisation before starting the RFP process then all parties will benefit.

Once the decision has been made to investigate a new system, the first thing that needs to be done is a full analysis of the existing system and workflows. The manager must find out what staff like and don't like about the existing system, what functionalities it performs well and where it is either weak or fails to perform at all. From this gap analysis exercise it is possible to get an idea of what is desirable in a new system. Finding out what other libraries in the region and/or sector have can expand this initial idea. If opportunities arise at conferences and meetings to talk to colleagues who have different systems then it is relatively easy to find out what they like and dislike about their systems. Be aware of the financial state of the project, and always be realistic about the amount of functionality that can be purchased for money made available (Metrick, 2002, p. L-8) and decide what is essential in this first phase and what might be purchased later.

Throughout this process the manager must keep an open mind and assess the quality of all new information. It will become obvious that some information coming from different sources is contradictory, so it is necessary to investigate further and perhaps obtain other opinions. The manager should be as objective as possible bearing in mind that sometimes people can be very defensive about their system choice, for they are aware that they can be criticized for making a poor decision, and some library

managers have less then complete confidence in their ability to make system choices. In other words, keep all options open. One purpose of an RFP is "to give all vendors an equal shot at winning the business" (Kochtanek and Matthews, 2002, p. 167), though in practice it seems that some managers close off the choice much too early in order to favour one vendor.

In this preparation stage the librarians have the opportunity to begin developing a good rapport with the vendors in the marketplace. This can be done formally through an RFI (Request for Information) or RFQ (Request for Quote) process or less formally simply by contacting the vendors to arrange a visit. Trade shows at conferences are a good place to meet vendors for the first time. Talk to the vendor staff at the trade show, watch a demonstration, and ask to meet again with a representative of the vendor's staff. At this point it is only courteous to inform the vendor where the library has reached in the purchasing process, and if it has money in the budget for this year, next year, or not at all.

Vendors are only too willing to help potential clients by providing information about their products and services prior to an RFP response, including coming onsite and providing workflow advice and system demonstrations. This provides the library with an excellent opportunity to find out how different systems perform and what features are available. At this stage the manager can assess the vendor's viability and get a good idea of which vendors are potential suppliers. Can they provide what the library needs at a price it can afford? A key point during system selection is that an organisation will need the chosen system to last for about ten years, on average, which means that it will need support from the vendor for at least that period of time, and that means the vendor must stay in business for ten years which is not guaranteed in a competitive market. As Levinson has said "If there's one thing that CIOs have to understand when selecting a software vendor, it's this: the software industry is fundamentally unstable" (Levinson, 2001, p. 65). For CIO read library manager and the selection team, for software read the whole LMS, but the message remains the same. It is quite normal to request a copy of the company's annual report, a Dun & Bradstreet report or credit references (Manifold, 2000, p. 123). It also means that the organisation should prefer long-term over short-term benefits.

Throughout the preparation stage it is important to ensure the full involvement of your stakeholders, which means that staff and IT departments should be involved in the process. Duck (1998) goes further, and suggests, "Consider dedicating another FTE to administering your new system. But, for goodness sakes, get them on-board before any selection process has begun . . . " In other words, don't select a system then ask a new appointment in IT to maintain a system that he/she dislikes at first sight. Yes, stakeholders are important, but the librarian should listen to their input yet not be driven by it.

3. Documentation for an RFP
There are three main rules:

Be clear:

- State exactly what is required and expected from a response.
- Give real world examples if necessary.
- Provide a clear picture of the institutional environment.

Be concise:
- Look for quality rather than quantity – eliminate redundant questions.
- Use the functional specifications to ask the key questions.

Be accurate:
- Provide accurate and up-to-date information – particularly for the technical environment.
- Proof read the document and make sure the instructions and questions are clear and unambiguous (Lemen, 2003).

Recommendations from the vendors surveyed for this paper included:
- Don't limit the RFP to Yes/No answers – give the vendors an opportunity to describe how their system performs each separate function.
- If there is a specific fixed technical requirement then say so up front, don't wait until later to say that the library must have an LMS that runs on Linux, or whatever.
- Do not repeat the same questions in different parts of the document.
- If using a document "borrowed" from another library, use it as a guide only and make sure it meets the library's specific needs. Also, make sure it is not based on older technologies that will constrain vendors.
- Don't include common functionalities, for this is a waste of the vendor's time. An informed librarian will know what functionalities are common to all the systems. There is 95 percent conformity in the technical services modules of LMS products (Boss, 1995a).
- Ask vendors to describe their development plans for the next two years, then look for clearly defined development paths not just techno buzzwords.
- Construct questions and requirements to draw out the unique and value-added features of each system.

Other factors identified that can be kept in mind when developing an RFP document include ensuring that the document is:

Measurable. Keep the final evaluation in mind. How is the selection group to compare responses and get a result?

Informative. Be focussed on solutions. All the vendors can provide the basic functionality; what the manager needs is to find out is how they intend to provide the solution. Boss said, "No system can be chosen for its functionality alone" (Boss, 1995b, p. 764).

Always focus on the critical questions that will determine the selection decision. The more vendors know about the library, the more focussed and customer-specific the response will be. If using a consultant, make sure that the RFP reflects the library and the organisation's specific needs. All too often consultants will use generic RFP templates and this can mean that the manager may fail to resolve a particular problem. A good RFP is a document that presents a strong emphasis on gathering information that is relevant to the selection decision making.

To ensure this the RFP must make statements and ask questions around the following areas:

Initial:

• Purpose and scope of the RFP process.

• Desired outcomes/goals.

• Implementation goals / timeframes – be realistic!

• Partnership expectations – ask for an executive summary from the vendor that is specific to your library needs that you can ascertain if the vendor has understood your specific needs.

• An indication of the budget you have available.

Organisational and technical environment:

• User information – vital statistics i.e. branches, stock levels, borrower numbers, staff numbers.

• Technical infrastructure – LAN specifications, interoperability issues, hardware specifications.

• What is the existing system and data format that will need to be converted.

Organisational strategic directions:

• Growth predictions.

• Amalgamation plans.

• Distance service provision /remote users.

• Expansion or changes in service levels.

Essential functionality requirements:

• Problems/issues for which a solution is needed.

• What functions/modules and needed and/or desired that the vendors may offer.

(But allow some flexibility to ensure that vendors can submit their responses in the best way that suits their systems and services – yet not so loose that the selection group cannot compare the responses.)

Service requirements:

• What are the library's service level expectations and how will the vendors meet these?

• Will the hardware be provided by an outside agency?

Realistic response requirements:

• Define clear expectations of your response requirements.

• Ensure to allow a realistic timeframe – four weeks minimum to ensure quality responses.

• Provide all documents in both print and electronic formats to the selected vendors.

Finally, before sending out the finished documents, ensure they are proof read. Vendors find it helpful to have the documents in electronic format (Lemen, 2003). Check

and double check that all documents are clear, accurate and concise, and that vendors can provide meaningful responses that can be easily measured. This is the one chance to get it right!

- Test all the questions – can they be easily evaluated?
- Confirm the key criteria and make sure they are included.

The later stages of the RFP process

Librarians should not forget that the RFP process constitutes only part of the complete series of operations that make up system selection. In addition, demonstrations, reference checking and site visits are equally as important. Before receiving the responses the library manager needs to decide how they are going to be evaluated. The librarians, or a selection group, should decide on weightings that will be attached to vendor responses. These will be based upon what is most critical to the library, e.g. price, functionality, service record, technical environment, or whatever. Once the key points and their respective weightings have been decided the evaluators will use them to select a shortlist of vendors to take part in the next stage, that of onsite presentations.

At this point, as a courtesy, the library should inform the unsuccessful vendors and explain to them why they failed to be short-listed. Remember, the vendors will have put a lot of effort into this exercise and it is only fair that they are told the reasons they were not successful. Sometimes it may be appropriate to give them another chance, especially if there is only one factor that they failed on, as it might be only a misunderstanding.

Onsite presentations

A shortlist of vendors will be selected and asked to give onsite presentations of their systems. To ensure that the evaluators can compare apples with apples it is a good idea to give a demonstration script to the vendors on the shortlist and a time limit to present it in. This allows the selection group to see the clear differences between the systems. The quality of the vendor's presentation will indicate their professionalism, their preparedness indicates how organised they are, and their ability to finish the demonstration on time can be some indication on how easy their software is to use. However, when preparing the script it is not wise to be so prescriptive that it prevents the vendors from offering their solutions to problems the library has identified, for they may have unanticipated solutions to those problems and it is very useful to hear them.

The library should allow each vendor one to two days for full presentations and ensure that all staff are organised and prepared to watch, listen and question throughout all the demonstrations. If there is a core of appropriate staff and organisational representatives that attend all the demonstrations it goes some way to ensuring a fair comparison.

Once the demonstrations are completed, the selection group should evaluate them as soon as possible while they are still fresh in people's memories. It is possible to identify areas that need clarification and to ask the vendors for clarification. At the same time the library can ask for a confirmation of price. It is necessary to keep reviewing and clarifying responses until the selection group is satisfied that they have a full understanding of all the issues that were identified in the process. In a thorough selection process, some library or technical staff can follow up the presentations with

reference checks and site visits to the vendor and other organisations that use the software being evaluated. Again, the selection group can respond back to vendors and ask for further clarification if needed on any issues that may have arisen from the site visits or reference checks. This full iteration of steps makes for a thorough process that builds confidence in the stakeholders. It is possible to consult with stakeholders, but not good to procrastinate over the final decision unnecessarily. After all, is a complete consensus among all stakeholders really likely? At this stage the library manager should be able to identify a clearly preferred option for a vendor and be prepared to open contract negotiations.

Congratulations, you are ready to select a new LMS!

In summary – what worked for us
These are the lessons of best practice that we have taken from the research and our own experiences with the RFPs from both sides of the process:

- *Teamwork and team involvement*. Right at the beginning of the process, set up a project team which included representatives from the IS/IT department. Every member of the team should have input into the development of the RFP. Once it is developed, circulate it to the whole library staff for comment and feedback, (but then edit the document draft down to a manageable size).

- *Management buy in and support*. By developing the project plan and defining the library's needs, the manager should be successful in getting management buy in and commitment to the project right from the start, so there should be no further debate on the funding of the project.

- *Good communication strategies are essential throughout the process*. Keep both library staff and the parent institution's management up to date throughout the whole process through a regular reporting structure at staff meetings and management meetings.

- *Pre-selecting the vendors to send RFPs to*. Do this at conferences, by talking to other libraries, inviting some vendors to provide preliminary demonstrations, reading relevant literature, and so on. This keeps the process to within an acceptable timeframe but it runs the danger of missing out on newer companies that are entering the market. However in practice, most managers are satisfied with using this advice.

- *Defining the project plan first*. Identifying the library's aims and needs to ensure that they are catered for in the RFP.

- *Using other RFPs as a guide*. This can make writing a lot easier, although using best practice, the manager needs to edit and improve old RFPs to make it easier for the vendors to respond in a consistent manner.

- *Setting the selection criteria before receiving the responses*. This makes it a fairer process and enables the selection group to identify the critical factors on which to evaluate the responses.

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