

# Considerations for Building an RFP (Request for Proposals) for a Library RFID Solution.

This list of questions is intended to be used as an *aide memoire* to help you create a specification for the supply of an RFID solution for your library service. It cannot be considered comprehensive since requirements will be affected by local factors and considerations. Library RFID offer a wide range of complementary services to assist you in making the best decision for your library.

## 1. GENERAL INFORMATION

1.1. It will be helpful for suppliers to have an overall summary of the main objectives of your project. You should be clear about your expectations in both the short and longer term and identify any areas of uncertainty in order to be sure of gaining an accurate response to your subsequent more detailed questions.

1.2. What are your general expectations of the project?

Are you, for example,

- Seeking specific service improvements?
- Trying to reduced staffing levels in particular areas of operation?
- Wanting to provide services outside of staffed hours?

1.3. What is the extent of the project?

- How many physical locations (branches, sites) will be included (now and in the future)?
- Do you plan to introduce all services at all sites?

1.4. What functions/services are required?

Specify your requirements, for example:

- Self-service, e.g. issue, return, renewal, reservations, fine payment etc.
- Stock management facilities, e.g. inventory, tracing, accessioning etc.
- Security
- Staff use
- Additional features, e.g. smart displays, interactive units etc.

1.5. What are the project milestones (dates)?

1.6. What is your planned procurement methodology?

- RFI, RFP
- Full tender (EU?)
- "Shopping List"
- Demonstration
- Presentation
- Site visits etc.

## **2. STATISTICS**

If you aren't sure how much equipment you may need – or if you want to test the expertise of the suppliers in forecasting equipment levels - it may be helpful to let them know some information about existing levels of activity and levels of equipment.

A simple table showing the breakdown of stock (and annual additions), registered borrowers, opening hours, existing staff workstations etc. – wherever possible detailed by site/branch – will provide a firmer basis upon which suppliers may base their estimates, and eventually their service level agreements.

## **3. LOCAL POLICY REQUIREMENTS**

Include any requirements in force at your library regarding policy on:

- Operating systems
- Networking
- Security
- Standards
- Interoperability with any Library Management System already in use
- Any restrictions on the use of third party hardware and software
- Any restrictions on using sub-contractors

## **4. FUNCTIONAL SPECIFICATION**

Whether you are buying a complete solution or a new component to add to an existing configuration you should prepare a “Functional Specification” detailing your precise requirements for the solution to be acquired.

Before you decide which questions to ask you will first need to think through how you will evaluate the answers. What are you trying to achieve by your questioning? A simple “tick list” of functionality may not elicit responses that will help you make the determination between supplier optimism and deliverability.

A list is important though, because only if you have asked the right questions can you be sure that any subsequent contract is enforceable. Some questions HAVE to be asked just to dot the “i”s and cross the “t”s, but consider asking suppliers to demonstrate their products before buying and be sure to talk to other users and do the research on what’s changing and what’s not.

### **Before drawing up your list**

Before you begin making the list of requirements decide how you will mark the responses. Since you will be relying on each supplier to give an accurate assessment of their current ability to deliver against each request you should be sure to ask questions that are relevant, accurate and unambiguous.

You must also decide which elements are mandatory and which merely desirable. There is a temptation to make everything mandatory but that is likely to produce one of two results. Either a) suppliers will say “yes” to things they know they cannot deliver because a “no” answer will rule them out or b) no-one will meet your criteria and you will have to start again. There is a third option of course – that someone will be able to supply everything – but you may wish to include at least one question to which you know the answer is “no” in order to test the veracity of all the other answers.

You can have as many levels of “desirable” as you wish of course but be sure to “weight” the value of the responses accordingly. Ideally you will be scoring each answer yourself – based on the understanding demonstrated by the answer - rather than rely entirely on the supplier’s own assessment so you would probably count 100% of the value of each mandatory met and slightly less for those rated as “highly desirable” or “desirable”. You may also want to ask some questions for information only.

It’s also a good idea to give suppliers an opportunity to express their opinions about how they see the future too. They will be eager to tell you all about their plans and ideas and if you don’t explicitly give them the opportunity to do so there’s a strong chance they will find a way to answer questions you didn’t ask!

You will make your first pass through the responses an easier task if you set out a standard list for self-assessment by suppliers e.g.

- A. Fully supported and on general release
  - B. Partially supported and on general release
  - C. Planned for a future release (please supply prospective release date)
  - D. Not supported
- (acknowledgement is made to Mark Hughes for these suggestions)

A second pass through should examine each answer in more detail to verify that the supplier has understood the requirement fully and answered accordingly. In order to make that assessment you will need to read any explanatory notes supplied carefully. Suppliers that do not offer detailed explanations of complex issues may not fully understand them, so be sure to clearly identify points requiring a more detailed response in some way. (Mark suggests using an asterisk)

Finally remember that the purpose of the list is to ask the questions you want answered. Be sure you understand the reason why you are asking each one.

### **The List**

Mark Hughes’ sample specification provides a very useful example of a specification which may freely be downloaded from the [ORILS site](#)

The document is based on a specification made for a complex project involving three academic sites in West Wales (which explains the occasional reference to “the partnership”)

and is a good example of the kind of template you should use for your own list.

Remember that you will have your own subtle variations on this theme. Be sure to include those that are relevant to your site and omit those that aren't.

When drawing up your version of the specification especially bear in mind that RFID is a *technology* whereas self-service is a *function*. **Self-service can be provided without RFID and vice versa**. Also remember that RFID solutions in libraries do not function independently of the existing Library Management System (LMS, or in the USA, ILS) but **depend** upon it.

The RFID/LMS (ILS) interface is the **key** relationship in building a successful implementation, and understanding how it works is possibly more important than anything else.

There is little point in specifying how the solution will handle events that are controlled by the LMS – like enforcing loan policies. Each supplier will be using the same interface to the same LMS so it will be difficult to differentiate between suppliers by asking questions about how the system manages fines or prevents over-borrowing.

Some of the key elements to assess include:

- Presentation – design and style of both hardware and software
- Reliability
- Conformance to standards – in particular the new data standards  
Quality of service
- Service enhancements – like interactive displays and new content-linking
- Accuracy and longevity
- Project Management and training
- Maintenance
- ... and of course cost.

## **5. SUMMING UP**

Buying a self service solution is relatively simple. Buying an RFID solution is much more complex and changing all the time. Keep abreast of developments by subscribing to the RFID lists in both the UK and US, read about progress with standards and innovations in the industry on the [Library RFID blog](#).

Library RFID Ltd has helped both libraries and their suppliers to better understand both the opportunities and the pitfalls of this exciting technology. Our services range from providing expert opinion on a single issue, through preparation or editing of specifications to full evaluation and project management of implementations. For more information contact [Mick Fortune](#).