

INTRODUCTION

The integrated library system (ILS) is the backbone of a library's organization, the most costly and important utility after the books on the shelves. Selecting a new library management system requires substantial amounts of a library staff's time, expertise, and patience.

As the market for library systems reaches saturation, nearly every library has been through a major ILS acquisition at least one time, if not more. By now, librarians are well acquainted with the available tools and functionalities of the ILS, meaning that the next-generation round of acquisitions, systems migrations, and updates involves a more intelligent customer base, one that is hungry for innovation at a low cost.

Library system vendors have responded with updated systems that run smarter and faster, using less hardware and simpler software. As a class of products, however, integrated library systems aren't big business for vendors—new-name sales are increasingly rare—and most revenues from ILS clients are the result of upgrades, or maintenance and support fees. To stay active in a challenging market, vendors have shifted their development efforts from basic integrated systems to products that enhance patron searches, catalog data, or linking.

Nonetheless, the role of the backend system (as the ILS is increasingly being known) is vital. Although major innovation in the ILS is evolving slowly if at all, neither librarians nor vendors can afford to forget it completely.

Library systems are still bought and sold, and the acquisitions process continues to play a key role in the duties of systems librarians and library administrators. At the outset, the central tool in the acquisition of a library system is the request for proposal (RFP), a document comprising instructions to bidders, systems and functional requirements, support and hardware specifications, acceptance testing, and reliability requirements.

An RFP seeks information from vendors about already-developed systems or systems in development slated for near-term release. A library does not expect any vendor to satisfy all its requirements. After receiving proposals, the library staff selects a vendor whose product strikes the optimal balance between price and desired function.

Many librarians, observing the state of near-identical development among integrated library systems, have suggested that the RFP is a hopelessly blunt instrument for procuring valuable, useful information. The current RFP, although not a dead document, is mainly seen as a necessary inconvenience, a cumbersome part of the state or institution-mandated paper trail for major financial acquisitions.

This report is an update of the November-December 1999 *Library Technology Reports*, "A Model RFP for an Automated Library System," written by Richard Boss, but it also reimagines the RFP, placing the document at the center of a newly integrated, lively approach to acquiring systems.

This report discusses writing techniques for the RFP that are designed to fetch original responses from vendors. The RFP becomes an invaluable tool when it is well written: it can meaningfully distinguish vendors from one another, and it can help you form detailed, realistic expectations about your purchase.

A new-name sale is a sale to an institution not already in the vendor's customer base.

If the basic features of library systems really are identical and well-known to all librarians, then now is the time to learn how to ask hard questions.

This report also considers nontraditional RFPs, documents that eschew boilerplate for bold questions or statements. Circulating a nontraditional RFP for a library purchase is becoming more common. While private institutions are more likely to follow the nontraditional route (such institutions are not beholden to state or public regulations governing purchase processes), public and state libraries can still incorporate some of these techniques into standard RFPs.

Although the use of an RFP is rare in purchases for digital library products or enhancement modules, this report suggests ways to use elements of the RFP in the acquisitions process.

In essence, this report is designed to help you shop more effectively for library system products. With the RFP at its center, it suggests new ways of acquiring information for making effective purchasing decisions.