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Issues in Vendor/Library Relations —
The RFP Process ... A Book Vendor’s Musings

by Mark Kendall (National Sales Director, YBP Library Services, 999 Maple Street, Contoocook, NH 03229)

In varying degrees, I’ve had the opportunity to be involved in the RFP (Request for Proposal) response process at YBP since 1995. Over the years I’ve seen RFPs from libraries take shape in numerous formats ranging from one-page questionnaires (often referred to as RFIs — Request for Information) to hundred-page, multi-section, check-few of “legalese” documents. Despite the varying formats, one constant remains: a desire on the part of the RFP-issuing institution for a thorough written vendor proposal addressing specifically how the vendor will meet the specified service needs of the library.

While there is ample practical and helpful information available today for institutions regarding how to write and evaluate an effective RFP, one area that often gets less attention, and might otherwise prove interesting to libraries, is what goes on behind the scenes at the vendor in preparing to respond to an RFP.

In most instances, the vendor’s RFP response is the culmination of many hours of work by numerous individuals and departments. Naturally, depending on the type of vendor, whether it be a book, journals or integrated library systems vendor, the approach to responding to the RFP will vary dramatically.

It should be noted upfront that just as the RFP is a critical document for the issuing institution in selecting the right vendor for a particular service, it is equally important for the financial health of any vendor that, based on its ability to deliver the requested services, chooses to respond. A well-thought-out, organized RFP response and proposal demands substantial hours of vendor staff time for research and preparation. Whether or not a bidding vendor is ultimately awarded the institution’s business, the cost to the vendor in terms of materials (assembling exhibits, paper, shipping) and staff time can often result in a significant expense. More important, though, is the financial impact on the vendor, positive or negative, that rides on whether or not the vendor is awarded the institution’s business. For example, if a vendor knows that it has been awarded a significant amount of new business by an institution via the RFP process, the anticipated revenue from this new business can be used to justify the cost of new product or service development. The opposite can hold true as well, for if a vendor experiences a string of RFP “losses”, the vendor may be forced to rethink the development or introduction of new services. Obviously, the need for the vendor to put its best foot forward with a thorough and well written RFP response has high stakes for both the RFP author and responder.

Once the RFP is received by the vendor, the process of assessing how, or whether, the vendor will respond begins. First, the vendor must consider several important questions. Among them: Are the services the bidding institution is seeking consistent with the vendor’s service continued on page 83
Thurston's terrific book, *The RFP Process-Effective Management of the Acquisition of Library Materials* (Libraries Unlimited, Inc., 1998). Full service vendors prefer to have the opportunity to be evaluated on their ability to offer solutions and services that address the library's needs rather than to be evaluated primarily on price.

One recent trend worth noting is the shortened length of time vendors are provided to respond to RFPs. Ideally, a vendor should be permitted a minimum of 30 to 45 days (or more) to prepare and submit an RFP response from the date the vendor receives the RFP. A recent sampling of RFP due dates required written vendor responses within two to three weeks of the RFP's issue date (usually the mailing or Web posting date of the document). Such a limited timeframe does not permit the vendor to provide its best possible response, which ultimately poorly serves both the issuing institution and the vendor. The timeframe conundrum can also be compounded by the fact that on occasion, there may be multiple RFPs being concurrently prepared by the vendor. Given the importance of this overall process to both institution and vendor, providing ample response time is crucial to all.

Many RFPs request that vendors provide an onsite presentation of their services. These presentations can occur either before the RFP is actually issued (generally to help determine which vendors should be sent an RFP) or after receipt of an RFP response to allow the vendor to present their services but also to engage in questions and answers pertaining to the RFP. In either case, the institution should allow the vendor sufficient time to provide a complete overview of its services while including time to demonstrate any databases germane to the needs of the library. Such presentations should be in a meeting area that offers the necessary audiovisual capabilities (Web access, projector, etc.). Allowing a minimum of two hours presentation time per vendor is considered ideal. Vendors prefer not to be "clustered" into back-to-back timeframes as this can make for awkward transitions (such as one vendor setting up while another is removing equipment). For the audience, viewing back-to-back or multiple presentations in a single day must assuredly be a difficult task at best. When scheduling vendor presentations, it is important to keep in mind that the key vendor personnel who will participate in the presentation are often scheduled weeks in advance. A vendor would prefer to have a minimum of 30 days advance notice for a required appointment to present its services, to ensure that the appropriate vendor team can present and schedule the necessary travel (most major airlines require a 21-day advance purchase to obtain the most competitive fares).

Lastly, (and this might sound rudimentary, but it's important nonetheless) vendors would like to encourage all institutions to please advise them regarding the awarding status of the business. As noted earlier, vendors invest substantial time and financial resources in preparing and delivering a well-thought-out RFP response. All vendors submitting RFP responses do so with the expectation and optimism that theirs will be the proposal selected. While the end result inevitably leaves some vendors disappointed, if they are provided notification that they were not selected, with some explanation as to the factor(s) that led to the selection of another vendor, they at least gain a better understanding of where they might have fallen short and how they can be more competitive in future RFP response situations. Just as important, too, is to notify the selected vendor of the award. Interestingly, I can recall several instances where substantial numbers of book orders suddenly began arriving at YBP as a result of an RFP award that we were not officially made aware had been awarded to us. While delighted to have been selected the new monograph vendor for the library, we would have been even more pleased to have had accounts set up to greet the incoming book orders!

In this current period of library budgetary and staffing challenges, the importance of a vendor's thoughtful response to an institution's RFP request is more paramount than ever. Perhaps this overview of how vendors generally respond to RFPs and other types of tenders will help us mutually achieve our common objective of ensuring the best possible written proposal to address the specific needs of the library.

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**Books Are Us**

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**Column Editor's Note: This column is supposed to cover fiction about people like us — librarians, publishers, vendors, booksellers, etc. All contributions, comments, suggestions are welcome. — AR**

I digress from “Books Are Us” to “Films Are Us.” I recently saw the 1947 film, *Good News* with June Allyson and Peter Lawford, now in DVD (2000, Turner Entertainment and Warner Home Video). June Allyson is working her way through college as the Assistant Librarian (not a student assistant?). She is the "brainiac" who tutors the campus football hero, Peter Lawford. Of course, she falls for him (but it takes the whole movie before he falls for her). In one scene, they sing together, dancing through the library, while she shelves books helter-skelter, not once looking at call numbers, or the books themselves, for that matter. In another scene, she is dressed to catch his eye, in a lace covered form-fitting, yet demure dress, with puffed sleeves, and a Peter Pan collar. One of continued on page 84

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