

November 1996

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John A. Wening  
*University of Missouri*

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### Recommended Citation

Wening, John A. (1996) "Procuring an Online, Fulltext Journal Resource," *Against the Grain*: Vol. 8: Iss. 5, Article 9.  
DOI: <https://doi.org/10.7771/2380-176X.1947>

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# Procuring an Online, Fulltext Journal Resource

by **John A. (Tony) Wening** (Program Manager, Missouri Research and Education Network, University of Missouri — Columbia, 1805 East Walnut Street, Columbia MO 65201. Phone: 573-884-7200. <tony@more.net>.

The State of Missouri, through the Missouri Research and Education Network (MOREnet), recently completed a procurement action for a statewide license for an online, fulltext, journal database. In this article, I will detail the process, rather than focus on the results of the procurement action and the pros and cons of the responses by the various vendors. Before getting it into the database procurement, a description of MOREnet and its role in Missouri are in order.

MOREnet began five years ago with a few higher education institutions who wanted to share an Internet backbone and connection. The consortium grew rapidly in the higher education community to over 50 members. In 1994, the Department of Elementary and Secondary Education asked MOREnet to connect all 525 school districts in Missouri. One year later, MOREnet was asked by the State Library to connect Missouri's public libraries. MOREnet also works with the state's Division of Data Processing and Telecommunications to support state agencies.

MOREnet provides more than just connections to the Internet. Through the consortium and the various state department funded projects, MOREnet provides training, technical expertise and consulting, reference desk, and connection monitoring services. Last year, the Missouri General Assembly added significant funding to the public library project line item for the express purpose of acquiring a statewide license for a fulltext journal database.

Key to putting together a good Request for Proposal (RFP) is understanding the process at your institution or in your state. Although most procurement rules have a focus on the lowest price, getting there may not as easy as it seems. At the industry level, take the time to learn about the vendors, their products, their reputations, and their "style". Ultimately, there must be a good fit between your organization and the vendor. On the local scene, policies, funding, and politics can all have a dramatic influence on your procurement action. Simply put, take the time to learn the rules and the players.

In preparation for writing the RFP we gathered information from the MOREnet community about their needs and desires, as well as their level of technology. Following that, we put together a special focus group consisting of librarians from higher education, K-12 school districts, public libraries, and state agencies. This focus group looked at the various features the community desired in an online database and suggested which feature should be specified as essential and which were desirable. The focus

group then reviewed the draft RFP and the final RFP before it went to the University procurement office for processing and public release. The essential elements identified by the focus group ultimately became the core of the RFP's mandatory requirements. We very purposefully kept the number of essential items to a minimum so we could qualify as many vendors as possible.

A focus group can be a tremendous asset — if they are selected properly. Since both functional and technical considerations were important to us, the focus group represented both sets of expertise. The librarians asked to be on the focus group were also selected to their ability to put local agendas aside and look at the RFP from a statewide perspective. We also wanted librarians who were well networked. One of their responsibilities was to discuss the RFP criteria with members of their individual communities. Lastly, we selected focus group members based on an orientation toward the end user, their customer. We decided early on that the system we acquired would need to be easily usable by public library patrons and students.

So, now we have a solid RFP. What did it look like? An RFP format will likely be governed by the state of institution policy and procedures and may vary somewhat from what we did in Missouri; however, I suspect that the important features are all present in every RFP regardless of format and sequence.

The first section in our RFP is sometimes referred to as "boiler-plate" or "legal-babble" because it contains all the legal constraints and explanations. The important part of this section are the contract period, particularly renewal options and how the contract is renewed. Pricing, contract terms, and payment information is normally contained in this section as well. Our next section was general information. For consortiums this can be a critical section because it is where you describe yourself. Who are you, how many are you, what is your customer/patron base, where you are, how are you connected (dial access or 56 kbs + data connection.) and what are your growth projections for the future.

For MOREnet, our technical environment and how we wanted to accommodate security and user authentication was a critical element. We insisted on authentication by IP address, because we control the IP addresses for our customers. Neither MOREnet nor our members had any desire to be burdened with vendor-issued user identifications and passwords.

The fourth section detailed the evaluation criteria. We had no specific product in



mind when we wrote the RFP and I would suggest that doing so is not a sound course of action. I've been involved in enough procurement actions to know that an RFP can be written in such a way that only a limited number of vendors will be able to meet mandatory criteria. I also know that this practice frequently causes institutions to miss opportunities for excellent products that may not fit a set of preconceived notions. Clearly defined evaluation criteria are also important because they will keep your procurement action from being challenged by a loosing vendor. Bottom line: Decide what's important and stick to it!

The final section of the RFP were the actual requirements and specifications. In the MOREnet RFP, these are divided into three segments: Mandatory Specifications, Desirable Specifications, and Questions. The first two are essentially self-explanatory; the third were designed to elicit responses to questions about how the various criteria would be implemented and the future plans of the vendor. For example, MOREnet has a statewide license for a TELNET client used by most but not all of our members. We requested the vendors identify specifically which TELNET client their software would support and would print remotely. Their answers were much more detailed than simply having a vendor specify whether or not they supported TELNET access.

We obtained a waiver from University procurement so that we could reduce the normal 50% weighting for cost to 40% on the basis that a cheap database that did not provide the robust technical and functional capability we were seeking would be a waste of the taxpayers money. The remaining 60% was split evenly between functional and technical capability.

We did make a bit of a blunder along the way. We assumed too much knowledge on

*continued on page 30*

**Online Fulltext Journal Resource**  
from page 28

the part of the vendor community. We didn't realize how unique and difficult to price a statewide license would be for the vendor community. As a result, when the first proposals came back, no vendor met the mandatory requirements. We examined the RFP, made a number of clarifications, and went into more detail in several areas before reissuing the RFP. The second time around, we also held a pre-bid conference that resulted in a minor amendment to the RFP.

The evaluation process we used was somewhat different than I had ever used before. The librarians we assembled for the evaluation panel were different than the group that made up the RFP preparation focus team. We again selected librarians from a segments of the MOREnet community — higher education, K-12, public libraries, and state agencies. Because I had been dealing with the vendors extensively during this period, I was a non-voting chair of the panel. Each vendor was invited to demonstrate their product, preferably on the machines in our training lab. Following the 1.5 days of demonstrations, the panel began its deliberations which consumed another 1.5 days. The first half day of evaluation compared the responses to the RFP to the mandatory requirements. This evaluation eliminated 4 of the 7 responses.

The panel itself then divided into two committees — technical and functional — to review in detail the remaining proposals. Each committee was assigned the specifications that pertained to their areas. Each performed its review in isolation of the other. It was not until the two committees recombined that they exchanged information about the number of points (of a total of 30) that each had awarded to the remaining three proposals.

The report of the evaluation panel is another possible failure point. It is what the procurement office will check to ensure that the evaluation panel performed its duties adequately. In most states, the report is public information and can be requested by any of the competing vendors — and usually is by vendors who thought they should have your business. My advice for an evaluation report? Keep it crisp; forget the flowery words and explain the evaluation process. Focus the meat of the report on the criteria and always assume that there will be a protest. Write the final report to answer questions that you would ask if you were the losing vendor. Who was the successful respondent, you ask? EBSCO Publishing's Masterfile 1000 was judged to be the best buy for Missouri.

In conclusion, a few general comments that might seem simple but are usually not so simple. When looking backwards there is always at least one BFO (Blinding Flash of

the Obvious) that you missed. Speaking of backwards, that's how to plan the RFP process. Pick the target date for starting the service and the plan in reverse. Then add 25%! If this is a large procurement (or maybe especially if it is a large procurement), the process will never work as neatly or efficiently as planned. (The planning process for our procurement action reminded me, more than once, of an old axiom: "Plans are great for getting you into things, but terrible for getting you back out.")

Manage expectations. You, your boss (or board), the people and institutions you serve, and the vendors all have expectations of great things. Almost always, these do not materialize the way you thought they would. Maintain an open mind and open communications. Be prepared to answer questions from the vendors as they are preparing their bid. The better they understand your environment, desires, and limitations, the better they will respond to the RFP with something you want. Most important of all, don't engineer the specs. State clearly in the specs what is important, and I can assure you that you will get it. A copy of the RFP we used (less all the University legal-babble) can be obtained by sending an email message to me at <tony@more.net>. The process we used is not limited to online database services, but could be used for virtually any evaluation of proposals for a large scale service. Good luck in your next major purchase! 🍀

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