

SUS Integrated System Task Force  
April 16, 1998  
University of Central Florida  
DRAFT

Attendees: Grady, Barry, Janice, Rosann, Mark, Sherry, Pam, Shixing, John, Michele, Martha  
Absent: Margaret  
Guests: Jim Corey, Richard Madaus

- I. Minutes - Martha Hruska volunteered to take minutes for this meeting. It was agreed that at future meetings, minute taking will rotate.
- II. Richard Madaus - CCLA Director  
Richard Madaus led the morning discussion reviewing the CCLA system selection process he directed when he first assumed the position of Director in 1989. Notes from his presentation will be distributed to committee members.

The presentation highlighted :

1. Procurement Process
2. Lessons learned
3. Changing Market Place
4. Advice Offered

1. Procurement Process for CCLA 1988

- ▶ RFI - general and conceptual in nature
- ▶ King Research contracted to do RFI
- ▶ Proof of concept --Can what is being proposed be done by industry at this point in time? Need for flexibility
- ▶ Logistical issues i.e. shared vs. separate databases
- ▶ Financial considerations

RFI Results

- ▶ Yes it could be done
- ▶ Cost \$14-16 million

Range of staff to support (actual 18-23, now larger)

- ▶ - 3 -7 from vendor perspective
- ▶ -14 -18 from consultant

RFP

- ▶ Vendors 17 interested
- ▶ 9 letters of intent
- ▶ 5 completed bid
- ▶ Bid Conference 2-3 hours with script
- ▶ Receipt of Bids - legal process
- ▶ Time spent up front - well spent

### Selection Process

- ▶ Sent out Dec. - due June - Contract July
- ▶ Contract Negotiation

### Implementation Planning

RFP Development - legal process attorneys purchasing agents

### Comments on RFP process:

- ▶ Small CCLA committee developed base RFP. Final version by consultant and Director
- ▶ Caution that system vendors may honestly answer multiple requirements- but maybe not all can work in combination--e.g. CCLA scoping vs. highlighting or extra costs
- ▶ Sent RFP to two other consultants to read as a vendor
- ▶ Outside "neutral" oversight for "sunshine" (FIRN Staff)
- ▶ Standard RFP process to copy lots of others
- ▶ Vendors have boiler plate responses

### Process - Bid Opening

- ▶ Read RFP responses
- ▶ Vendors want copies of each other's responses
  - ▶ CCLA charged copy fee
- ▶ Use attorneys to advise on what is proprietary
- ▶ Dial into existing systems that vendors have up and running
- ▶ Vendor satisfaction survey (by committee members)
- ▶ Consultant Hardware review
- ▶ Submit list of questions to vendors
- ▶ Vendor Session -- 3 hour script:
  - ▶ hour one - demonstrate answers to questions by dialing into live system - not demo database
  - ▶ hour two - vendor show off time
  - ▶ hour three - grows out of first two
- ▶ Each vendor session was unique
- ▶ Site visitations with no vendor reps present spent \$30k travel about 7-9 sites visited
- ▶ Narrow to two - more site visits and corporate visitations
- ▶ Selection vote

## 2. Lessons Learned

- ▶ You are NOT Buying a System, you are marrying a vendor. The system will change over time, the vendor won't
- ▶ There is NO perfect system, only promises of one or combination of

different systems.

- ▶ Only believe what is at an installed site, all else is vaporware
- ▶ All vendors will pretty much have something eventually. How long are you willing to wait.
- ▶ Time spent with customers better spent than with vendors.
- ▶ Vendor's financial status and longevity perspective is more important than current functionality of product.
- ▶ Rigid selection algorithms can get you a system you don't want. Better off with flexibility on back end of the process and you LEARN a lot during the process.
- ▶ BEST VALUE
- ▶ Normalized vendor prices after fact

### 3. Changing Market Place

- ▶ 1970-95 Legacy Mainframe Systems
- ▶ 1998- New Technology Systems
  - ▶ (Parallels with 1970 status of mainframe systems)
  - ▶ (See distributed copy for diagrams depicting Legacy architecture vs. New Technology Systems Architecture)
- ▶ Jan 1994 widespread Web emergence
- ▶ Web Based System needed now
- ▶ New Technology Systems Architecture
  - ▶ Two New Product Lines:
    - 1) Library Management Tools
    - 2) Information Utility (formerly OPAC)
- ▶ Downloading records into workstation moving back- TOTALLY Different from manipulating data on mainframe
- ▶ Information Utility
- ▶ The Web is OPAC
- ▶ " " " "
- ▶ " " " "
- ▶ Ability to massage/manipulate PAC-
- ▶ No longer vendor specific
- ▶ Broader range of tools
- ▶ More flexibility
- ▶ Probable multi vendor/local dept. mix
- ▶ Broadcast searching, i.e., Meta Crawler searches 5 web search engines at once. Simultaneous search of databases user selected
- ▶ CCLA will investigate DRA Web 2 and Site Search 4.0  
[HTTP://Cypress.dev.oclc.org:19500](http://Cypress.dev.oclc.org:19500), or a combination of both.
- ▶ Legacy Systems 'bent' built technology to lib specific needs (custom design niche market).
- ▶ In New Technology, library systems use great deal of existing technology used by others (Web, JAVA, etc.)
- ▶ Conclusion--> we're not as special as we used to be

#### 4. ADVICE

- ▶ Approach newly established vendors with caution
- ▶ Who needs whom the most?
- ▶ Promises to make the deal?
- ▶ On the other hand, new vendors may be most creative
- ▶ Marrying vendor
- ▶ On Library Management side-only
- ▶ Not on Web Pac side.
- ▶ Will vendor still be Player 5-8 yrs from now
  - ▶ Why? Why not?
- ▶ How many sales must vendors make to stay afloat?
- ▶ Myth vs. reality
  - ▶ Myth: system that is good, cheap, and fast
  - ▶ Reality: Any two of the above
- ▶ DRA - Taos architecture not installed, functioning anywhere CCLA will get TS workstation client this summer -

#### III. Discussion items:

- ▶ John Hein: What is role of FCLA in this process??
- ▶ Committee need to grapple with architectural issues
- ▶ RFI as learning process
- ▶ Grady: Why do we want new system
  - ▶ What is available in new technology?
  - ▶ Advantages of new technology over legacy technology
- ▶ Migration process will be painful and unpleasant
- ▶ Post migration
- ▶ Dissolution of niche market
- ▶ Capitalize on existing technology
- ▶ RFI process to gather inf. about market place--> Assess market place
- ▶ Keep options open
- ▶ Should the process include statement from FCLA staff re costs to develop??
- ▶ Mark Hinnebusch: Every Tues. a.m. we have new system -- no publicity - no documentation
- ▶ Web LuisTask Force doesn't want to use Java, frames. Important to support access from old browser versions
- ▶ Michele Newberry: before sending RFI to vendors, ask colleagues to review (with compensation)
- ▶ FCLA has copy of Site Search 4.0
- ▶ Corey issues to consider:
  - ▶ Size machines - costs
  - ▶ Lists of high level questions for RFI - save detailed functions for RFP
  - ▶ Tell us what your system would look like if single monolithic - costs
  - ▶ If separate, how many would there be?
  - ▶ Copies??

- ▶ How achieve union catalog?
- ▶ Vendor's experience converting kind of (NOTIS) records?
- ▶ Charges?
- ▶ Implications? Data lost?
- ▶ Migration with existing system -- absorb budget costs
- ▶ Costs for separate systems - HIGH probability
- ▶ Request for Information gives answer in writing back
- ▶ Money and architectural issues
  - ▶ what would it cost - are there different levels/ways to accomplish
- ▶ Hein - 2 levels of functionality
- ▶ RFP very detailed functionality
- ▶ How much would it cost to have everything in your system?
- ▶ What is in it?
  
- ▶ Timetable & Next Steps
 

▶ RFI (send out)	Summer (July) 98
▶ Results RFI back	Aug 98
▶ Assess RFI	Late Summer -- Fall 98
▶ Discuss results	Fall 98
▶ Decide whether to go forward	Spring 99
▶ Submit budget request	June 99
▶ Submit RFP	2000-01?
  
- ▶ Gather 5-10 broad general questions from each functional subgroup.
- ▶ Subgroup chairs work with their groups to come up with questions by May 1.
- ▶ Grady will work with Michele on demographics
- ▶ Vendor to give 2 scenarios
  - 1) One central system
  - 2) 10 distributed systems
- ▶ 2.5) Scoping
- ▶ Hardware scalability (Corey)
- ▶ Buy central hardware - contract w/ NERDC to baby-sit
- ▶ Another scenario would give machine (approp size) to each lib.
- ▶ Staffing side to each scenario
- ▶ RFI's to certain vendors -
  - ▶ send out announcement
  - ▶ put on Web
- ▶ See LJ article Apr. 1 issue
- ▶ Vendor demos -- consider for next Midwinter
- ▶ Tentative June 18 meeting date (same time, same place) to sign off on RFI.