

TENDERING FOR LIBRARY SERVICES AND SUPPLIES

David Sidebottom

Report of a workshop led by David Sidebottom and Jill Taylor-Roe which took place at the UKSG 21st Annual Conference, Exeter, March 1998

In the workshops on tendering we endeavoured to draw from the experience of the participants to form a general consensus on this issue. Whilst consortia were not addressed specifically, it is linked as most UK academic tendering is initiated by the consortia.

Opening with an ice-breaker sketch of a Librarian-from-hell and a representative of Sleaze Subscription Service we highlighted what we thought was the way in which tendering should NOT be approached by the parties involved.

Five key questions were put to the group and the following is a summary of the input of the two groups who attended:

1. Why are you tendering?

- save money
- legal contract
- more business-like
- compare suppliers
- please paymasters
- guarantee service standards
- EC regulations
- finance office instruction
- seeking better terms
- get better range of titles
- outsourcing
- consolidation
- better service
- rationalise suppliers
- consortia pressure/power

2. What do you hope to achieve by tendering?

- more value: service level agreements, claims, etc
- improve management of electronic resources
- improved service/service level agreement
- better dialogue/working relationship with suppliers
- same journals for less money
- more journals for less money
- keep finance office happy
- rationalise suppliers
- economies of scale
- promote electronic services
- standardisation
- staffing levels maintained
- positive PR
- ease of use

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3. What will be your evaluation criteria?

- level of service: claims, communication
- cost of moving business
- cost benefit analysis
- payment terms
- price
- service
- consolidation service
- added benefits/service
- management information
- past experience
- financial stability/capability
- references
- customer relations
- financial references
- reputation
- Year 2000 compatibility
- strategic vision
- ISO 9000
- presentation/print + personal visits
- IT infrastructure
- Investors in People award

4. Who will decide and how will they make a decision?

- purchasing managers - staff at grass roots
- acquisition managers - legal advisor
- finance officer - steering group
- chief librarians

5. How will you assess whether you got it right?

- use service level agreement
- all journals delivered
- price comparisons
- compliance with services level agreement
- formal feedback/evaluation +/-
- invoice audit
- contractual review
- feedback from end users
- profit/increased turnover
- review relationship with supplier
- sustainable services
- +/- feedback to/from suppliers
- annual review
- feedback from library staff

In conclusion, several experienced 'tenderers' expressed concern over the eventual financial and/or service rewards resulting from the process, weighed against the time invested in initiating a tender.

We hope the above will be helpful in clarifying the points to be taken into account both prior to and during a possible tender.