BIC/CILIP
RFID in Libraries Group

RFID Implementation Checklist

RFID – Which applications? How and why?

RFID can be applied to library work in many different ways, but the main objective underlying its introduction is usually improvement in customer service. If that's not your aim, why are you doing it?

There may well be other reasons. Perhaps you're opening a new library? Or simply want your service to be at the technological cutting edge? Maybe you need to respond to a Gershon agenda? Or resolve a specific local problem? Whatever the aim, however, it will usually be secondary to making the library more customer-focused and easier to use.

Regardless of your starting point, you will soon find that the pervasive nature of RFID and its potential applications offer you the opportunity to fundamentally review most of the processes in your library. Will you simply automate your existing procedures, or completely re-engineer them?

This RFID implementation checklist has been specially produced by the BIC / CILIP RFID in Libraries Committee, chaired by Martin Palmer of Essex County Council Libraries. This committee has been set up to provide guidance for libraries planning to implement RFID and to develop guidelines that will increase the interoperability of different RFID systems used in libraries. For further information please contact Brian Green at brian@bic.org.uk

This RFID Implementation Checklist was prepared by the BIC/CILIP RFID in Libraries Group for distribution to delegates at the RFID in Libraries Conference 2005 organised by CILIP Enterprises.

Compiled by Martin Palmer

How will you use RFID to help improve your service to customers? Will it include:

Self Service?	yes ◯	no ◯
Return chutes/book drops?	yes ◯	no ◯
Extended opening hours?	yes ◯	no ◯
Unstaffed service points?	yes ◯	no ◯
Security?	yes ◯	no ◯
Improved ease of use?	yes ◯	no ◯
Alternative ways of presenting stock?	yes ◯	no ◯
Navigating the library?	yes ◯	no ◯

Other (please specify)

What do you intend to use RFID for?

Stock:

- Books   yes ○   no ○
- Audiovisual   yes ○   no ○

- Other (please specify)

Users:

- Smart cards   yes ○   no ○
- Smart cards including electronic cash   yes ○   no ○
- If opting for smart cards are there other considerations (see also "parent organisation" section below) e.g:

    - Can your cards be used in a wider internal   yes ○   no ○
    organisation context such as Access Control?

    - Can you use cards already used in an   yes ○   no ○
    external context e.g. Oyster cards?

    - If either is possible,
    who "owns" them?

    - Other (please specify)

Do you need to ensure that any resulting changes conform to policies your parent organisation (local authority, university etc) may have for:

ICT?	yes ○	no ○
Human Resources?	yes ○	no ○
Finance?	yes ○	no ○
Procurement?	yes ○	no ○

Other (please specify)

How will it affect staffing and procedures? Will you include:

Stock management:

- Circulation?   yes ○   no ○
- Editing?   yes ○   no ○

- Other (please specify)

Automatic sorting:

- Of "exceptions" e.g. requests, interloans?   yes ◯   no ◯
- Of all stock for shelving?   yes ◯   no ◯

Acquisitions (internally):

- Tagging of all new stock?   yes ◯   no ◯
- Review of stock processing/servicing e.g. date labels, barcodes?   yes ◯   no ◯
- Effect on delivery points?   yes ◯   no ◯
- Other (please specify)

Acquisitions (externally):

- Review of supply chain implications?   yes ◯   no ◯

Handheld device for:

- Stocktaking?   yes ◯   no ◯
- Shelf tidying?   yes ◯   no ◯
- Locating requests, etc.?   yes ◯   no ◯

Culture change:

- Staff roles?   yes ◯   no ◯
- Job profiles?   yes ◯   no ◯
- Structures?   yes ◯   no ◯

Following on from this – how will you calculate Return on Investment? Will it include:

Staff savings?   yes ◯   no ◯

Staff redeployment?   yes ◯   no ◯

Other (please specify)?

How will RFID work with your Library Management System (LMS)?

Will you keep your existing LMS?   yes ◯   no ◯

Does your current (or prospective) LMS supplier also provide RFID?   yes ◯   no ◯

If so, do they insist on their own solution?   yes ◯   no ◯

If not, will the systems use SIP2 (developed by NISO into NCIP (Z39.83) in 2003)?   yes ◯   no ◯

Is your LMS fully SIP2 compliant?   yes ◯   no ◯

Is someone responsible for managing relationships between LMS and RFID suppliers?	yes ○	no ○
Does the solution fully implement library lending policies as defined by item and borrower status within the LMS?	yes ○	no ○
Will future LMS releases impact on RFID?	yes ○	no ○
And vice versa?	yes ○	no ○
Does your LMS deal with payment of fees and charges?	yes ○	no ○
If not, will this impact on the take-up of Self Service?	yes ○	no ○
Can RFID screens be used on staff stations?	yes ○	no ○

Do you know what happens:

• If LMS goes into backup?	yes ○	no ○
• When LMS returns from backup?	yes ○	no ○
• To stations for both staff and self-service?	yes ○	no ○

Will you need back office RFID stations?   yes ○   no ○

• If so, do you know how many?	yes ○	no ○
• Do you know what the staff interface will be?	yes ○	no ○
• Do know what equipment and connections will be required?	yes ○	no ○
• Do you know which operating system will be used?	yes ○	no ○

Choice of RFID system

Is the system compatible with any standards?	yes ○	no ○
Do you know which standards?	yes ○	no ○
Are tags "standard"? Answer 'no' if they are proprietary	yes ○	no ○
If RFID is not being used for security, do you know how it interacts with the security system?	yes ○	no ○
Do you know how the tag's data is structured?	yes ○	no ○
Is the tag an EAS tag? Answer 'no' if it is an AFI tag	yes ○	no ○

Are tags:

• Only unique identifiers ("licence plates")?	yes ○	no ○
• Or do they hold more data?	yes ○	no ○
• Is there a choice?	yes ○	no ○
• Interoperable?	yes ○	no ○

Do you know the read range (actual, rather than claimed) of:

- Tags?   yes ◯   no ◯
- Security gates?   yes ◯   no ◯
- Anything else relating to the "security corridor" for:
    - checkout (issue)?   yes ◯   no ◯
    - check-in (return/discharge)?   yes ◯   no ◯

Do you know how effective the system is?   yes ◯   no ◯

Does the system deal with multiple items simultaneously?   yes ◯   no ◯

Do you know how many items?   yes ◯   no ◯

Do the self service units cater for:

- Self issue?   yes ◯   no ◯
- Self return?   yes ◯   no ◯
- Renewals?   yes ◯   no ◯
- Enquiries?   yes ◯   no ◯
- Reservations?   yes ◯   no ◯
- Integration with security gates?   yes ◯   no ◯
- Management information?   yes ◯   no ◯
- Anti-Virus protection?   yes ◯   no ◯
- Documentation?   yes ◯   no ◯
- Other (please specify)

Does the furniture meet:

- Your requirements?   yes ◯   no ◯
- Health and Safety legislation?   yes ◯   no ◯
- Disability Discrimination Act requirements?   yes ◯   no ◯ -
- Is it flexible/adaptable?   yes ◯   no ◯

Do the terminals:

- Meet the needs of users with visual or learning impairment?   yes ◯   no ◯
- Offer a choice of language?   yes ◯   no ◯
- Offer immunity to interference?   yes ◯   no ◯

Does all equipment (including handheld devices) meet requirements of:

- Health & Safety?   yes ◯   no ◯
- Ergonomics?   yes ◯   no ◯
- Is it flexible/adaptable?   yes ◯   no ◯
- Is the system customer-/user-friendly?   yes ◯   no ◯
- Does the system produce receipts?   yes ◯   no ◯

If so:

- Are they legible? yes ○ no ○
- Do they omit personal data? yes ○ no ○
- Can the customer control production? yes ○ no ○
- Do you know what kind of printer(s) are used? yes ○ no ○
- Do you know who supplies the paper? yes ○ no ○
- Do you know how much it costs? yes ○ no ○

If your service has more than one library:

- Will RFID be installed in all of them? yes ○ no ○
- If not, how will RFID and non-RFID libraries work together?

Is your system interoperable with different suppliers' equipment? yes ○ no ○

Similarly, if RFID is used in only part of a library, do you know how that affects the remainder of the building? yes ○ no ○

Do you know:

- How much staff training is needed? yes ○ no ○
- Who will provide it? yes ○ no ○
- How much it costs? yes ○ no ○
- How long it takes to tag an item? yes ○ no ○
- Whether tagging units can be re-deployed for other purposes after initial tagging has been completed? yes ○ no ○
- Are CDs/DVDs dealt with? yes ○ no ○
- Are VHS/Audio tapes dealt with? yes ○ no ○
- Are multi-part formats dealt with? yes ○ no ○
- Are multiple disc or tape sets dealt with? yes ○ no ○
- Are maps dealt with? yes ○ no ○
- Are picture books dealt with? yes ○ no ○
- If so, do you know how? yes ○ no ○

Is the tag adhesive effective for:

- Books? yes ○ no ○
- VHS/Audiotapes? yes ○ no ○
- CDs/DVDs? yes ○ no ○

Are there archival/preservation implications in the use of tag adhesive? yes ○ no ○

Are all new tags usable? yes ○ no ○

Is a failure rate quoted for new tags? yes ○ no ○

If so, do you know how replacements are provided?　yes ◯　　no ◯

Handheld device

- Does it interface with LMS?　yes ◯　　no ◯
- Do you know its read range?　yes ◯　　no ◯

Will your stock suppliers be able to
tag new stock for you?　yes ◯　　no ◯

If so, will they also be able to write to tags:

- Only if access to LMS is available?　yes ◯　　no ◯
- Without need for LMS access?　yes ◯　　no ◯

Tag supply: is there scope for cooperation
with other RFID users (e.g. retailers)
to reduce price?　yes ◯　　no ◯

Timeframe

Do you need to tender?　yes ◯　　no ◯

Do you have a strategic ICT partner?　yes ◯　　no ◯

Do you know how much stock you have to tag?　yes ◯　　no ◯

Do you know how many staff you can devote to it?　yes ◯　　no ◯

Do you know how many tagging stations are required?　yes ◯　　no ◯

Will the supplier provide extra stations during
initial tagging process?　yes ◯　　no ◯

Does RFID need to link to building or
refurbishment work?　yes ◯　　no ◯

Do you need planning permission?　yes ◯　　no ◯

Do you need listed building permission?　yes ◯　　no ◯

Are there any other implications for the
library layout?　yes ◯　　no ◯

Do you need to close?　yes ◯　　no ◯

Will you get tags and hardware or software
from the same supplier?　yes ◯　　no ◯

If separately, and the system doesn't perform,
do you know how you will resolve queries about
whether the tags are to blame?　yes ◯　　no ◯

Ultimately, do you know who makes the final
decision regarding choice of system?　yes ◯　　no ◯

Is there a test environment for the system?　yes ◯　　no ◯

Do you have a start-up budget?　yes ◯　　no ◯

Do you have sufficient revenue budgets for
future purchase of tags?　yes ◯　　no ◯

Support and maintenance

Do you know:

- What's included?   yes ◯   no ◯
- How much it costs?   yes ◯   no ◯
- The effective life of the system?   yes ◯   no ◯
- The effective life of the tags?   yes ◯   no ◯

Staff

Will RFID affect:

- Ways of working/work culture?   yes ◯   no ◯
- Job profiles/structure?   yes ◯   no ◯
- Training/Development?   yes ◯   no ◯

Do you need to consult unions?   yes ◯   no ◯

Data Protection and Privacy

Will the system enable you to fulfil your obligations under the Data Protection Act?   yes ◯   no ◯

Will tags contain any personal data?   yes ◯   no ◯

If you have RFID customer cards/tickets, will they contain any personal data?   yes ◯   no ◯

Does your LMS allow identification by customers of items from item number via OPACs?   yes ◯   no ◯

Will tag data include ISBNs?   yes ◯   no ◯

Promotion and Public Relations

Do you have information for customers on:

- Background info: what RFID is/how it works?   yes ◯   no ◯
- Privacy concerns?   yes ◯   no ◯
- Cost-effectiveness?   yes ◯   no ◯
- User training?   yes ◯   no ◯

Monitoring

Do you have a plan for monitoring the effectiveness of RFID?   yes ◯   no ◯

CCS
CILIP CONSULTANCY SERVICES

cilip
Chartered Institute of
Library and Information
Professionals