



The Massachusetts Library Network Cooperative (MassLNC) is seeking a quote to provide training and consulting to assist consortia staff in planning and implementing Evergreen for three consortia serving 218 public, academic, school and special libraries in Massachusetts. Two of the consortia are migrating from Innovative Interface's Millennium ILS and one consortium is migrating from SirsiDynix's Horizon ILS.

Background:

The Massachusetts Library Network Cooperative (MassLNC) is a collaborative project among three consortia to implement and initiate joint development projects for Evergreen. The participating networks are Central/Western Massachusetts Automated Resource Sharing, Inc. (C/W MARS), serving 155 public, academic, school and special libraries; Merrimack Valley Library Consortium (MVLC), serving 35 public libraries; and North of Boston Library Exchange (NOBLE), serving 28 public, academic and special libraries.

Each participating consortium will run a separate instance of Evergreen. However, the three are planning to use a shared data scheme and set up their organization units with the same hierarchy. This data scheme and hierarchy must be able to meet the unique needs of each of the consortia and their libraries.

Each participating consortium is running a test installation of Evergreen. C/W MARS and NOBLE are running Evergreen 1.6 and MVLC is running trunk. Staff from all three consortia have attended two-day System Administration training from Equinox, covering the Evergreen system logical architecture, hardware/physical infrastructure, software infrastructure, configuration files, database schema, and best practices for system administration.

Audience:

The audience for this class is consortia staff that will be configuring the system, setting up the hierarchy and system parameters, and providing support to staff in member libraries. Any training provided should be directly related to issues consortia staff will face when configuring the system, setting up work flows and customizing displays.

Required Services:

1. Provide training to include:
 - a. Evergreen key concepts (as defined in the Book of Evergreen Outline at <http://evergreen-ils.org/dokuwiki/doku.php?id=evergreen-docs:outline>)
 - b. Reporting
 - c. Server administration settings
 - d. Local administration settings
 - e. Administering and setting up parameters for cataloging, circulation services, holds and the online catalog. Although this training is not intended for the end user, it should include a general overview of these areas.
 - f. Migrating data
 - g. Z39.50 server
 - h. SIP2

- i. Third-party system integration
 - j. Best practices for building a test database
2. Provide consultation to assist the participating consortia in creating a hierarchy that will best meet the unique needs of each of the three consortia and their member libraries.
3. All material created to provide these services should be made available to the Evergreen community using Creative Commons Attribution-NonCommercial-ShareAlike 3.0 Unported License

Responding to this Request:

In responding to this request, quote should include the following components:

- A. *Scope of Work and Cost Proposal*: Complete responses for each item in Required Services section above (using the same numbering system). Please provide two separate quotes for each required service: one for delivering the required service on site at a participating consortia office in Massachusetts and one for delivering the required service online.
- B. *Relevant Experience*: Detail your firm's experience in providing Evergreen training and consultation services.
- C. *References*: Provide information on whether your firm has conducted Evergreen training and provide contact information.
- D. *Trainers/consultants*: Identify the people who would be providing training and consulting services. Please include a resume or CV.
- E. *Methodology*: Describe how your firm will approach the described tasks.

Evaluation:

MassLNC will evaluate submissions on a qualitative basis. This includes discussions with other clients, and the firm's completeness and timeliness in its response to us. Please submit your response proposal by June 16, 2010.

Contact

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Requests for additional information should be sent to Kathy Lussier by June 9, 2010. Responses to these requests will be posted to the MassLNC site at www.masslnc.org by June 11, 2010.

Please return the completed quote to Kathy Lussier at the above address or via email no later than June 16, 2010.