



REQUEST FOR QUOTES

Code Development for Enhancements to the Evergreen Open Source Integrated Library System

The Massachusetts Library Network Cooperative (MassLNC) is seeking quotes to develop an interface that will facilitate communication between Evergreen and URSA 2.6.

Background:

The Massachusetts Library Network Cooperative (MassLNC) is a collaborative LSTA-funded 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 (MVLV), serving 35 public libraries; and North of Boston Library Exchange (NOBLE), serving 28 public, academic and special libraries.

MVLV plans to go live on Evergreen in May 2011. C/W MARS and NOBLE plan to go live later in 2011 and 2012.

URSA (Universal Resource Sharing Application) is a SirsiDynix product that facilitates resource-sharing among disparate Integrated Library Systems. The Massachusetts Virtual Catalog uses URSA 2.6 to support resource-sharing among 14 distinct library systems. To continue participation in the Massachusetts Virtual Catalog, consortia participating in the MassLNC project will need development for Evergreen 2.0 to communicate with URSA 2.6.

Any development procured through this RFP, along with associated testing and modifications, is expected to be completed by June 1, 2011.

Scope of Work:

Any development procured through this RFP must be made available under the GNU General Public License version 2 or later (Appendix A.) The code for this development must be contributed to a public repository no later than a week (5 business days) after MassLNC's final acceptance of the development work.

URSA 2.6 uses Z39.50 to search across library systems and utilizes a terminal session to interact with circulation processes via an expect-like script. The developer needs to develop an interface that emulates a terminal session menu and invokes OpenSRF calls to perform those processes in Evergreen.

URSA must connect to the system via SSH or telnet and log in with a user name and password. URSA expects a VT100 80 column 24 line display and a menu. URSA maintains its connection following each

task and needs to navigate back to the main menu using a consistent set of keystrokes that do not include the use of function keys.

The menu system must conform to the following Ursa 2.6 workflow for processing ILL requests:

1. Patron logs into URSA using their library barcode number and password. URSA connects to the patrons' ILS and retrieves name, barcode, email, phone if available, type or status. An error message must be displayed if the patron is not on file or expired. URSA can examine the patron type if access will be denied based on patron type. The SIP2 Patron Information Response can serve as a model for the type of patron data URSA may need to retrieve.

EVERGREEN: search for patron by barcode and display name, phone, email, permission group, expiration date.

2. Patron does search of participating systems. URSA searches systems and retrieves matching bib records, holdings and shelf status via Z39.50. URSA can acquire local system number, ISBN, LCCN or OCLC number from MARC record. The preference is for URSA to retrieve a unique local system number that can be used in the next step.

EVERGREEN: z39.50 search returns bib and holdings information including owning organization and shelf status.

3. Patron places request. The URSA script logs into the lending library system, searches for the title by number retrieved in the previous step, and places a hold on the title for a dummy virtual catalog patron already in the system. If the hold is not allowed due to circulation policy, a message must be returned.

EVERGREEN: place hold for the specified patron using a unique record number to identify the title.

4. When the library is ready to ship the loan, they perform a SHIP LOAN in URSA. The URSA script logs into the lending library system and checks the book out to a dummy patron.

EVERGREEN: check out copy identified to the patron identified.

5. When the borrowing library receives the item, they perform a RECEIVE LOAN in URSA. The URSA script logs into the borrowing library system and creates a very short bib (title only), call number and copy using the barcode the operator keyed in during the receive process. The script places a hold on this item for the real patron who originally requested the item. This bib record should be suppressed from the OPAC display.

EVERGREEN: add bib and copy. Place hold for patron identified.

6. When the patron returns the book, the borrowing library performs a RETURN LOAN in URSA. The URSA script logs into the borrowing library system and deletes the temporary bib and copy.

EVERGREEN: delete bib and copy.

7. The lending library system receives the book back and performs COMPLETE LOAN in URSA. Staff do the checkin in Evergreen in case there are holds or the item needs to go in transit.

EVERGREEN: no action

At any step of this process, the system needs to return the appropriate message to the virtual catalog script whenever an error is encountered (e.g. system number is not on file, patron number is not on file, item to be deleted is not checked in, etc.)

Responding to this Request:

Please submit your proposal electronically in PDF, OpenOffice and/or Microsoft Office format. In responding to this request, the quote should include the following components:

- A. *Scope of Work and Cost Proposal:* The cost proposal should include pricing for development and subsequent testing and modifications.
- B. *Methodology:* Describe how you or your firm proposes implementing this development, including an estimated timeframe for the project.
- C. *Relevant Experience:* Detail your, or your firm's, experience contributing to the Evergreen Open-Source ILS project. Provide examples of enhancements or bug fixes you or your firm has contributed that were ultimately committed to Evergreen. Provide any other details about your involvement in the Evergreen community.
- D. *References:* If you or your firm has previously provided Evergreen development services on behalf of a library or other organization, please provide client contact information. Otherwise, please provide contact information for people you have worked with in the Evergreen community.
- E. *Project Lead:* Identify the person who would be responsible for this project and include a resume or CV.

Evaluation:

MassLNC will select the contractor(s) based on the following:

- A. compliance with the RFP (10 points);
- B. how closely the proposal meets the requirements of the RFP (30 points);
- C. demonstrated relevant previous experience (20 points);
- D. demonstrated involvement in the Evergreen community (10 points);
- E. costs and value for money (30 points).

Reference checks for the top scoring respondent and any other respondent that is within 10 points of the top scorer. A maximum of 10 points will be awarded from discussion with supplied

references. A serious deficiency in any one criterion may be grounds for rejection regardless of overall score.

MassLNC reserves the right to:

- A. discontinue this RFP process without obligation or liability to any potential vendor;
- B. accept or decline any or all proposals;
- C. accept all or any part of any proposal, unless specifically stated otherwise in the proposal by the respondent;
- D. accept other than the lowest-priced proposal;
- E. award more than one contract.

Contact:

Kathy Lussier, Project Coordinator
Massachusetts Library Network Cooperative
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Suite 201
Worcester, MA 01606
klussier@masslnc.org

Timeline:

Please return the completed quote to Kathy Lussier by 5 p.m. Tuesday, November 30, 2010. Requests for additional information should be sent to Kathy Lussier by November 15, 2010. Responses to these requests will be posted to the MassLNC site at www.masslnc.org by November 22, 2010.

The schedule for the issue of this RFP is expected to be as follows. This timetable may be subject to change at the discretion of MassLNC.

Milestone	Deadline
Release of RFP	November 8, 2010
Questions from potential respondents about scope or approach	November 15, 2010
Answers to questions about scope or approach	November 22, 2010
Quotes due	5 p.m. November 30, 2010
Target date for review of quotes	December 6, 2010
Selection of contractor(s)	December 8, 2010
Anticipated commencement date of work	December 15, 2010