



REQUEST FOR PROPOSALS

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

The Massachusetts Library Network Cooperative (MassLNC) is seeking proposals for developing enhancements for the Evergreen Integrated Library System.

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 (MVLN), serving 35 public libraries; and North of Boston Library Exchange (NOBLE), serving 28 public, academic and special libraries.

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

The requirements in this RFP have been ranked by priority. Development procured through this RFP, along with associated testing and modifications, is expected to be completed according to the following schedule:

Priority 1 requirements: by June 1, 2011

Priority 2 requirements: by July 1, 2011

Priority 3 requirements: by August 15, 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.) Final specifications must be posted for the Evergreen community no later than two weeks (10 business days) of MassLNC's approval of the specs. The code for this development must be contributed to a public repository no later than two weeks (10 business days) after MassLNC's final acceptance of the development work.

Category: Acquisitions

ACQ-01: Ability to receive a batch of items by invoice

Priority: 1

- The system will provide the ability to receive items from an invoice.
- The system should provide an option to select items on an invoice and to then receive the selected items.
- The system should also provide an option to receive all items on the invoice.

Note: Current functionality allows users to receive individual line items from a purchase order and to receive all items from the purchase order in a batch. This requirement is seeking the same functionality from an invoice.

ACQ-01 Use case: Library A places an order for 10 titles on February 10 and for another 20 titles on February 15. On February 22, the vendor ships four of the titles from the February 10 order and 12 titles from the February 15 order. The electronic invoice includes all of the items that are part of this shipment. After verifying that all of the items on the invoice are in the shipment, staff is able to receive all of those items in one step. If an error was made and some items are missing from the shipment, staff is able to select the shipped items from the invoice and mark them as received.

Category: Cataloging

A. Enhancements to Z39.50 import

CAT-27: The system should provide the ability to mark a local record for overlay from the search results pane of the Z39.50 screen.

Priority: 3

- In the MARC Import via Z39.50 interface, the system should provide an option to mark a selected local catalog result for overlay.
 - This option should be unavailable when a result from a Z39.50 target is selected.
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CAT-28: The system should provide functionality to designate a set of Z39.50 targets that are only available to users with elevated permissions.

Priority: 3

- The system will allow administrators to configure Z39.50 targets that are available to all users who have permission to import records via Z39.50.
- The system will allow administrators to configure another set of Z39.50 targets that are only available to users with elevated permissions.

CAT-28 Use Case: Consortium A would like provide permission to cataloging staff at individual libraries to import records from the Library of Congress. When cataloging staff utilizes the MARC import via Z39.50 utility, the Library of Congress is the only Z39.50 target available to them. At the same time, consortium staff needs more options when importing bibliographic records. Because consortium staff has elevated permissions, they have a larger set of Z39.50 targets available to search, including OCLC and biblios.net.

B. Enhancements to label printing

CAT-29: Support for batch printing labels on 8 1/2 x 11 sheets

Priority: 2

- The system should provide the ability to print batches of spine and pocket labels on 8 1/2 x 11 sheets of labels.
 - The system should support multiple label dimension templates where users define label height and width; the number of columns and rows on each sheet; the size of the top margin and left margin on the page; and the vertical and horizontal pitch.
 - A consortium should have the ability to set up a variety of label dimension templates that are available for libraries to view and use for label printing.
 - Other organizational units should have the ability to create their own label dimension templates that are only accessible to staff at their library or for organizational units beneath them in the organizational hierarchy.
 - The system should print spine labels across rows. For example, when printing a batch of seven labels on a sheet with five columns of labels, the system should first print on the five labels across the first row and should print the remaining labels using the first two labels in the second row.
 - The system should provide users with the ability to identify a starting label for printing. For example, if the sheet has already been used to print four labels, the user should be able to start the next batch of printing on the fifth label in the first row.

- The system should support the ability to print on sheets that only contain spine labels, those that only contain pocket labels, and those that contain both spine and pocket labels.
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CAT-30: Label options

Priority: 2

- The system should provide users with the ability to configure the text alignment options (left, center, right) for all labels. Individual libraries should have the ability to set a default for text alignment.
 - The system should support the ability to include HTML code in the custom text field for labels.
 - For spine labels, individual libraries should have the ability to set a default to split call numbers across multiple lines at the decimal and to split call numbers across multiple lines at the space. Staff should be able to override these options for a given batch of labels.
 - The system should support options for units of measurement that includes inches, centimeters, and characters & lines.
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CAT-31: Streamline printing of labels during item creation

Priority: 2

- When printing labels at the time of item creation, the system should provide an option in the volume/item creator to automatically print spine labels without further prompts.
 - When selected, the system will bypass the spine label configuration screen, the preview and print screen, and the Windows print dialog.
 - When selected, the system will automatically print the labels using the most recent label dimensions used at that workstation.
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Category: Circulation

CIRC-04: Ability for patrons to identify preferred notification methods.

Priority: 1

- The system should give users the ability to designate their preferred notification method for different type of notices.
- Libraries should have the ability to identify which notification methods should be available for each type of notice and to select the default notification method for each type of notice.
- Notification methods should include mail, telephone and e-mail. There should also be a “no notice” option.
- Users should be able to designate their preferred notification method for the following notices: holds notices, overdues, and courtesy (predue) notices.
- Users should be able to identify their preferred notification method through account preferences in the public catalog. Staff should also be able to identify the preferred notification method on behalf of users in the staff client.
- The preferred notification method field should be available for queries in the Evergreen reports interface and should also be a macro available in the receipt template editor.
- The system should have the ability to only send e-mail notices to users who have identified e-mail notification as their preferred notification method.
- Systems configured for print notices should have the ability to only create print notices for users who have identified mail as their preferred notification method.
- Systems using telephony should have the ability to only call users who have identified telephone as their preferred notification method.

CIRC-04 Use Case:

Library A would like to offer different preferred notification methods for its users, but does not want to offer all methods for every type of notice. The library is able to configure the system to offer users the option of telephone , e-mail or no notice as the preferred notification method for holds notices and courtesy notices. For overdues, users have the option to choose either mail or e-mail as the preferred notification method. The library has set e-mail as the default for courtesy and overdue notices, but telephone as the default for holds notices.

Users can log into account preferences in the public catalog to identify their preferred notification method. There is also an option in the staff client to identify the preferred notification method on behalf of users.

CIRC-05: Ability for patrons to define the timeframe for courtesy (predue) notices.

- Users should have the ability to define that courtesy (predue) notices be sent x number of days before an item is due.
- Libraries should have the ability to define a default setting for the timeframe in which predue notices are sent.

Category: Public Catalog

PAC-02: Enhancements to book bag functionality

Priority: 3

- The system provides the ability for users to sort the titles in their book bag by title, author or publication date.
- Users should have the ability to export a book bag as a CSV file.
- Users should have the ability to provide a long description for their book bags and to annotate the titles in their book bags.

PAC-03: List of recent searches available in catalog

Priority: 3

- Users will be able to access a list of recent searches performed during a session.
- This search history will be available in the public catalog and in the staff client.
- From this list of recent searches, users will be able to re-perform the search by clicking it or otherwise selecting it.

Category: System

SYS-05: Additional export options for reports

Priority: 3

The system will provide the ability to send the output of reports via e-mail and to export the results of some reports to a bucket.

- The system should provide the ability to e-mail the entire output of a report. On the report configuration screen, the system should provide an option to send the output of the report to an e-mail address.
- If the output of a report contains copy or bibliographic information, the system should provide the ability to export those copies or titles to a copy bucket or record bucket. On the

report configuration screen, the system should provide exporting to a bucket as an output option.

SYS-06: Support for SMS functionality

Priority: 3

The system will provide support for SMS functionality that will enable users to send call numbers from the catalog to their mobile devices via SMS and to receive holds notifications via SMS.

- The system should provide support to send messages via an email-to-SMS gateway.
- The system should provide the ability for adding a global set of mobile carriers that will be available to users and to identify the e-mail format the system needs to utilize when sending messages via those carriers. The e-mail format will usually be in the format of *mobilenumber@smsaddress.com*, but may also require specific alphanumeric characters to precede the address, e.g. *1mobilenumber@smsaddress.com*.
- The system should provide the ability to customize the catalog so that users can text call number and title information to their cell phone.
 - This message, including the sender's e-mail address, should not exceed 120 characters in length.
 - If a bibliographic record contains more than one copy of the title, the system should give users the ability to select which copy's call number will be sent.
- The system should provide the ability to send holds notifications via SMS. An organizational unit should have the ability to turn this functionality on or off.
 - These messages, including the sender's e-mail address, should not exceed 120 characters in length.
 - The system should provide SMS as a holds notification option at the time the hold is placed through the public catalog or through the staff client.
- At any time a user opts to use SMS, the system should provide a prompt for the user's mobile number and carrier. The carrier should be selected from a list of supported carriers that had previously been configured by the library.

SYS-06 Use Case:

Library Consortium A decides to implement SMS functionality utilizing mobile carriers most heavily utilized by their population. They are able to identify each of those mobile carriers and provide the mail-to-SMS gateway that should be used when sending SMS messages to their users. For example:

Carrier Mail-to-SMS Gateway

AT&T *number*@txt.att.net

Sprint *number*@messaging.sprintpcs.com

Verizon *number*@vtext.com

After setting up the carriers, Consortium A is able to customize the catalog to include a "Send via Text Message" link in the bib record display. When a user clicks this link, the system will prompt the user for their mobile phone number. The system will also prompt the user to select their mobile carrier from the list of previously-configured mobile carriers.

After adding the mobile carriers, the consortium can also enable holds notifications via SMS. Once enabled, SMS will be an additional notification method available for users to select at the time they place their holds. When a user selects SMS notifications, the system will prompt the user for their mobile phone number. The system will also prompt the user to select their mobile carrier from a list of the previously-configured mobile carriers.

Responding to this Request:

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

- A. *Scope of Work and Cost Proposal:* Respondents to this RFP may provide proposals for one or any number of projects outlined in the Scope of Work section. Respondents should provide pricing for each project for which they are submitting a proposal (use the same numbering system.) Each proposal should include pricing for development and subsequent testing and modifications, as well as an estimated timeframe for the project. If the respondent believes there is a benefit to breaking up any of the above projects into pieces, he or she is welcome to provide pricing for each of those pieces.
- 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 will be conducted 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:

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Worcester, MA 01606
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Timeline:

Please return the completed proposal to Kathy Lussier by 5 p.m. (EDT) Wednesday, March 30, 2011. Requests for additional information should be sent to Kathy Lussier by March 14, 2011. Responses to these requests will be posted to the MassLNC site at www.masslnc.org by March 18, 2011.

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	March 2, 2011
Questions from potential respondents about scope or approach	March 14, 2011
Answers to questions about scope or approach	March 18, 2011
Proposals due	5 p.m. (EDT) March 30, 2011
Target date for review of proposals	April 4, 2011
Selection of contractor(s)	April 6, 2011
Anticipated commencement date of work	April 20, 2011