

Procedure for Soliciting Community Contractors and Service Providers

The Islandora Foundation (IF) supports the establishment of contracts with individual service providers and contractors in the Islandora community in order to support key development tasks for Islandora software. The following document outlines the procedure for originating a request for proposals from community contractors and service providers, reviewing and selecting service providers and contractors, and completing work with service providers and contractors.

1. Determining a Need for Contract Work

The need for contractor and vendor intervention in the code and community may be recognized at any level, but must be approved by the IF Leadership Group before going to bid. Work must be generalized features or software work that has been agreed will benefit the community at large, particularly the supporting members of the Foundation.

There will be two distinct types of projects: Specification Projects and Implementation Projects. Specification Projects will document the requirements for a given feature or functionality, while Implementation Projects cover the actions that bring this vision to reality. Development Projects must have a Specification prior to going to bid, whether that Specification comes from a prior Specification Project or from an individual/institution within the community.

The IF leadership group may agree that a call for proposals should be promoted through the community Google list. Such listings shall require the following:

- a) The request for proposals should contain as many details of the required need as possible, including links to relevant GitHub issues and documentation, and should be preserved in the Islandora Foundation's Official Documents. For Implementation Projects, it must contain a link to a Specification.
- b) A minimum of one individual deputized by the IF Leadership Group must agree to represent the IFs interests and act as liaison and "Product Owner" (see further information below) for the work being proposed, and be identified in the listing.
 - i) A working group can collaborate to fulfill this responsibility, so long as a chair of the working group is appointed by the LG.
- c) Timeline constraints must be listed, if they exist.

Guidance for Product Owners:

- Your role is to shepherd the project from concept to specification to implementation, ending with acceptance of new code into the Islandora ecosystem.

- Prior to finalization of specification: it is your role to ensure that the right parties are given the opportunity to review and comment on the various project documents.
- During finalization of specification: it is your role to integrate feedback into the project documentation: you have a wide degree of latitude with regards to what is “in” and what is “out” for this work. Items left out may be picked up later as subsequent projects, but since there is not time nor money to do everything at the present moment, prioritization decisions will need to be made, and the expectations of the community will need to be managed.
- After finalization of specification: it is your role to create Github Issues for the components of the final projects, including/linking all specifications and defining acceptance criteria before posting a public call to the Islandora Community via the email listserve. This can be as simple as an email outlining the project as a whole, and then a call to action for interested parties to review the linked Github Issues and respond (via Google form or similar) with Bids or offers to complete specific components on a pro-bono basis. A deadline for submission should be stated, as well as overall project timeline and budget constraints, if known.

2. Process for soliciting, collecting and adjudicating proposals

- a) An email will be sent with the call for proposals, with clear dates, as well as the scope of work to be addressed in the proposal (see immediately above).
- b) Proposals should be sent via email to a IF board member¹, who gathers the applications together for review by the leadership group.
- c) A subset of the LG, in combination with the Product Owner and any members invited by the Board or Leadership Group, with attention to the [IFs Conflict of Interest policy](#), will meet to adjudicate the assignment of the contract. The criteria by which the proposals will be evaluated will be written down and agreed upon between the adjudicating members prior to the adjudication. A template for these criteria is available. The Board Treasurer’s role is to advise as to the fiduciary viability of the proposals, except for where this presents a conflict of interest, in which case another member of the Board will adopt this role for the adjudication of the proposals. The Product Owner’s role is to answer questions from Vendors, and be the authoritative source for disambiguation and clarification.
- d) Where the subset of the LG and the Product Owner are not in consensus about who receives the contract, the matter shall be escalated to the Board. Where serious disagreements continue at the Board level, the process may be considered failed, and must be repeated or discarded.

¹ In the future when the Foundation has full time employees again, this should be revisited to determine if this is still the most appropriate structure.

3. Awarding a contract

The LG Board Treasurer or designate takes on the responsibility of onboarding the selected contractor or vendor. This includes:

- a) Developing an adequate reporting process to preserve 4. Transparency in Development (in collaboration with the product owner or Chair of a working group associated with the proposal)
- b) Ensuring that the contractor or vendor has been introduced to the business officer for the IF and can be paid.

The Chair or designate communicates with those that forwarded unsuccessful proposals. In some cases, feedback may be provided to service providers or contractors to guide them in future proposals.

4. Transparency in Development

- a) All software development must take part in the public GitHub repositories, utilizing projects and tickets as necessary. The Product Owner shall remain active in this process, answering questions and clarifying as needed. The Product Owner shall perform User Acceptance Testing, provide feedback to the vendor(s), and ultimately sign off on project completion.
- b) In the case where a contractor or vendor is working for the IF, they are deputized by the Foundation to act on the Foundation's behalf to further key infrastructural projects. It is possible that the normal guidelines for merging code may be temporarily altered in order to facilitate the work of a contractor or vendor. For example, the requirement that another organization merge code may not apply.
- c) The costs of contracts must also be transparently reported as part of the annual AGM reporting completed by the Board's Treasurer.

Resources

Sample Service Level Agreement