

American Library Association
50 E. Huron Street
Chicago, IL 60611-2795
December 11, 2009



REQUEST FOR PROPOSAL

Response requested by February 15, 2010

1. RFP Overview

The American Library Association (ALA) is seeking a vendor to handle the migration of <http://www.ala.org>, which includes 11 division subsites, a number of online publications, and our site for the public (I Love Libraries <http://www.ilovelibraries.org>) to a new content management system. Simplifying the site organization and maintenance is a key component of what we hope to achieve in the new CMS.

We are also seeking an alternative solution for creating new and transforming existing forms (several hundred active and legacy Cold Fusion applications and FormMail). We are not wedded to the continued use of Cold Fusion and want to move away from it, so the system should allow for arbitrary data sources (separate MySQL databases) and other languages besides CF, including but not necessarily limited to Python, PHP and Ruby. It is crucial that we have the ability to either render existing CF aps so that they look and behave like the rest of the site or move them to another system that can do so.

If the recommended system is not open source, it would be very desirable if ALA could license the original code for internal use. At the very least, we would want access via an API.

The system must support our 200 member-volunteer and 80 staff content managers with easy-to-understand-and-use features for quickly adding, updating, and publishing content in a browser-agnostic interface. The ideal solution would also make it possible for content managers to store digital content in a searchable format so that it is no longer publicly available, but still accessible for reference if needed.

ALA's Information Technology & Telecommunications Services (ITTS) staff must be able to assist with the implementation and ultimately take responsibility for managing the site. Although ITTS hosts the site for ALA, off-site hosting can be an optional addition to the RFP, at your company's discretion.

2. Project Deadlines (*NB: ALA's fiscal year begins September 1st.*)

- Ballpark pricing (optional, and no legal hold-to, just very useful for assistance with our fiscal 2011 budget cycle): January 5, 2010
- Proposals due February 15, 2010; early proposals welcome
- Optional: Site visits by prospective vendors who wish to make presentations to staff: February – April, 2010

- Project awarded: May 2010
- Requirements document: August 1, 2010
- Work to begin: September 1, 2010
- Completion: No later than May, 2011

3. Background

ALA's current content management system is Serena Collage, v. 5.1.3.4. The content of ALA's website is housed in an MS SQL 2000 database, soon to be upgraded to MS SQL 2005. The code that generates member-only pages references ALA's association management system database, which is currently in MS SQL 2000 but soon to be SQL 2005 running in SQL 2000 compatibility mode. ALA's current installation is of iMIS 10.6.30.17. Although a date has not yet been set, we plan to upgrade to iMIS 15.

A Google Search Appliance is installed on the existing site, and Google Analytics code has been embedded on the site.

The public website is accessed via a content services switch that funnels traffic to two load balanced Linux servers. We would want the new system to have no fewer than two servers as we want uninterrupted 24/7 site availability. There is a Barracuda 460 Web Application Firewall in front of ALA's public facing zone.

ALA's blogs are in WordPress, wikis in Mediawiki, mailing lists in Sympa, online courses use Moodle, and ALA Connect, our professional networking site, was built using Drupal, as was our Beta version of American Libraries magazine. Sympa is hosted internally, but the other resources are hosted off-site, with everything except ALA Connect (connect.ala.org) and American Libraries hosted by DreamHost. We currently use Open AdStream to add ads to American Libraries; there is some interest in using an open source ad serving package like OpenX on the entire site.

Our existing web services include:

Authentication web service returns XML if the provided iMIS ID and password can be validated against iMIS. This service makes it possible to allow for single sign on between ala.org and connect.ala.org.

GetProfile web service returns an XML dataset of profile information for a specified iMIS ID. Selected fields returned are:

- ReturnValue of 0 validates iMIS ID (username) and password ID
- First name, Last name
- Member type and member type description
- Paid_thru

GetParticipations web service is single service for participations; there is a parameter to determine either current or historical (all) participation information for a specified iMIS ID; returns an XML dataset. Selected fields returned are:

- Current/Historical committee(s)

- Current/Historical unit(s)
- Current/Historical meeting(s)

4. Scope of Project

The project objectives are to:

- Reduce overhead and maintenance costs.
- Improve the stability, security, speed, reliability, usability, WCAG 2.0 accessibility, and search engine optimization of <http://www.ala.org>.
- Make it possible to provide a site that features customizable options, interactivity and multimedia, including personalized landing pages featuring RSS feeds based on unit memberships that can be customized by the end user to add or remove features.
- We would also expect to be able to easily:
 - Incorporate and customize RSS feeds from internal and external sources to pull dynamic content from our wikis, blogs, and ALA Connect;
 - Provide Web 2.0 services integrations for popular sites, such as Twitter, Flickr, Facebook, Delicious, Second Life, RSS, Dopplr and other social networking sites;
 - Offer embeddable widgets delivering content from our site to other sites;
 - Support user applied metadata (tags) to create various tag clouds, such as most popular, most shared, and/or other bubble-up features, such as survey results; and
 - Allow moderated comment capability for members or registered users on pages set to allow posting.
- Provide a CMS that integrates with whatever e-commerce product or solution ALA implements (RFP forthcoming) as a replacement for the existing Active Matter system that handles dues, subscriptions, donations and registrations and integrates with iMIS.
- Use the migration as an opportunity to further refine the default design of the division subsites, and when applicable, their section subsites with a more standardized approach to organization and labeling; to also standardize as much as possible the left navigation of round tables subsites (*see Appendix A for information about ALA's structure*). Because there will be a great deal of internal discussion and negotiation related to this objective, you will not be responsible for it, but should be aware that it is one of ITTS' internal goals for the project. We will jointly decide whether ITTS staff should implement the changes in the old system and migrate them to the new, or migrate as is and make the changes after the fact.
- Migrate XML and other content files from Collage to one system or multiple systems that work together seamlessly and implement the project as described herein.
- Propose a solution for our Cold Fusion forms and FormMail, as described in the RFP Overview.

- Provide members-only access to web pages and other selected resources based on the results of the GetParticipations web service.
- Recommend and implement an approach for the creation of online search interfaces to display information stored in databases.
- Provide staff and member-volunteer content editors with a browser-agnostic, easy to learn and use editing, publishing, and possibly, archiving system.
- Optional, but very desirable: The recommendation and implementation of a product or solution to support storing, in a searchable form, materials no longer needed by the public.
- Train ALA ITTS staff to use essential reports, create new reports, and to maintain and troubleshoot the implementation.

5. Features of Our Current CMS

Our existing CMS has a number of content management features that we have found useful, and we would want our new CMS to also have the ability to:

- Verify external links, identify bad internal links
- Update all iterations of a link, whether internal or external
- Replace all references to one file with another
- Create and install custom metadata fields
- Apply different looks to content (master pages, templates)
- Create custom page layouts (1, 2, and 3 column, others?)
- Internal search capabilities
- File versioning and rollbacks
- Spell check, WYSIWYG editor, H-mark up menu, and preview mode
- Withhold content from publishing until a specified date
- Easily create redirects
- Publish PDFs as XML web pages (we are not using this feature but should)
- Set up workflows

6. Problematic Issues Related to Our Current CMS

- We have not been able to accomplish a full site deploy, which prevents the current CMS from automatically removing deleted items from the servers and healing broken internal links, making site maintenance a headache.
- The CMS hasn't been updated to work with current versions of browsers or mobile browsers.
- The preview function is unreliable.

- There's no inherent interactivity or any Web 2.0 features.
- The content management interface is not user friendly; workflows are tedious and time consuming. The interface does not support drag and drop.
- Expiration dates on content do not remove content from the servers.
- We cannot export data on users and permissions using the interface, as the standard report errors out.
- The Active Matter e-commerce and Collage systems do not integrate seamlessly, causing a number of usability and maintenance problems.

7. Existing Customization

We would be interested in your suggestions about how to achieve our objectives with a product that requires a minimum of customization.

- As stated, simplifying the infrastructure and the site maintenance is a key component of what we hope to achieve in the new CMS. The existing implementation has 82 master pages, most of which are still in use, an equivalent number of document types, and 265 CSS files (some probably no longer in use), referencing 125 site structures, some of which create dropdown shortcut menus, rather than separate sites. There are also about 90 JavaScript files. Some of the existing complexity is due to ALA's own structure, with the balance being due to the way Serena Collage builds sites.
- Right nav 'pods' to create a modular right column layout with images and links
- JavaScript based internal tagging taxonomy that controls dynamic display of items to listing pages and of news items to right navigation 'pods' and to the home page news area.
- Redirect document type for internal links that tracks changes to the target file location and automatically updates upon deploy
- Cold Fusion files to control the left navigation build
- Committee templates for member groups, which display rosters from iMIS and public posts from ALA Connect.
- Reports to indicate:
 - pages with bad internal links, and to identify the links;
 - which resources have been tagged to which listing pages
 - file name duplication within a directory
 - the use of illegal characters in a file name
- Customization of HTML Tidy to enforce certain style guide issues and to alert ITTS to violations of XHTML and various accessibility issues
- Google Analytics & Key Matches (ALA Suggestion)

8. New Features & Functionality

- ALA Dashboard: A customizable page that a member can use to view account information, access forms, and control the display of information from various sources; the default setting would automatically display new postings from those parts of the site that the person has memberships to or an interest in. Members should be able to subscribe to this view and have a stream of updates sent to them. Use your creativity to describe how you would approach this, as ALA Dashboard counts significantly toward the awarding of this contract.
- Basic HTML/CSS text wrap around images or embedded media players
- Ability to see thumbnail of image being chosen for insertion
- Publishing is time-consuming in the current CMS. An ideal system would have one or two click publishing.
- Provide a form solution for existing and new forms that allows site visitors to search for information in databases and display the results online.
- Custom system for relocated resources that shows the new address, then redirects to the new location of the item, and reminds users to update bookmarks.
- Improvements or changes to global left nav, to display the main site options in addition to the section options on lower level pages.
- Optional but desirable: A way to store files that allows searching and display to authorized personnel; this should not be a full blown military-industrial-government sort of thing, but must make it possible for content managers to rapidly hide items from the web servers (unpublish) and store them where they can still be accessed via an internal search interface that allows previewing or in some way displays them with their original content.
- Ability to display name of person responsible for a page's content, along with title, contact information, and date updated or reviewed.
- Ability to display graphical site maps in site sections.
- An easy way to use RSS feeds to pull in content from other sites and to send out content from the site
- Ability to embed content, use widgets, make widgets available
- Establish a controlled vocabulary and keyword metadata

9. In a Perfect World...

- A modular framework to allow for iterative improvements, so that we can add the next new thing without extensive retooling
- Real time publishing and distribution
- Ability to create persistent URLs or a solution that would allow us to specify a permanent location for selected pages, regardless to changes to the site structure or organization
- Robust statistics to keep us informed of member logins and page views

- Ability to see Google or other analytics from within the CMS

10. User Permissions

Ideally, we would be able to use our existing web service to authenticate both site visitors and CMS users (login and password). The CMS should fully encapsulate authentication from the rest of the system, allowing ALA to upgrade authentication modules independently of the CMS. The CMS should be responsible for all authorization (IE, permission handling) within the site. The content management system permissions must allow site administrators full access, and make it possible to set permissions for other groups or individuals at a granular level on subsite directories and/or files.

We would like to have the ability to import authorizations from our association management system to the CMS. These authorizations are currently available via our GetParticipations web service.

For posting purposes on the site, the web services must recognize staff and member log-ins, as well as non-member, registered user accounts.

We are open to your thoughts on directory service integration; it would be highly desirable to explore a web service that queries iMIS and then the CMS for authentication.

11. Selection Criteria

Preference will be given to candidates who meet the most criteria from the following list:

- Creative, intelligent solutions, featuring a willingness to explore ways to simplify our approach and decrease our maintenance expenses
- Ease of database access (Microsoft SQL or MySQL preferred)
- CSS, JavaScript, XHTML & XML
- Commonly available platform for application development; if, as desired, you plan to help ALA move away from the use of Cold Fusion, experience migrating applications from it to ..?
- Three or more years experience in content management implementations, migrations, and integrations with web services; experience connecting to iMIS association management software is optional, but a plus
- Project management skills, including the ability to work within deadlines
- Proven ability to communicate with staff and clearly document work; willingness to use a limited access wiki or other platform to document the project
- Thorough knowledge of WCAG 2.0 Guidelines; see <http://www.w3.org/TR/WCAG20/>.
- Optional but desirable: One or more years experience developing and/or implementing digital archives

12. Project Elements

Note: Incorporate training and documentation costs into the overall implementation costs.

- If product is not open source, system purchase and end-user licensing for about 300 total users, although only 40 content editors need have back-end access at any one time. System and website should be browser-agnostic, providing support for Internet Explorer, Mozilla Firefox, Apple Safari, Google Chrome and mobile device browsers.
- Development, migration into, and documentation of the new system, which must allow members-only authorization at the primary level, with granularity also at the division, section round table, and event levels (*see Appendix A for information about ALA*).
- Assistance with the development of the site infrastructure
- Creation of profiling and customizing features and options for the ALA Dashboard
- Migration of 40 gigabytes of existing content files (XML, image, and other file types).
- Optional but desirable: Procurement and set up of the digital archive.
- Documentation of site set-up and training of ALA ITTS staff to assist with the migration and to manage and maintain the system.
- Form development and management solution for transitioning existing Cold Fusion web applications and Form Mail.
- Annual support in the form of a service level or other agreement.
- Optional: Although ALA ITTS currently hosts the site, we are open to alternatives.

13.00 Administrative Guidelines

13.01 Deadlines

- Project awarded: May 2010
- Requirements document: August 1, 2010; intermediate milestones will be agreed upon
- Work to begin: September 1, 2010
- Completion: No later than May, 2011

13.02 Testing

The testing schedule will be agreed upon during the development of the requirements document, and will be updated as needed. We expect you to make every reasonable effort to meet deadlines, and ALA ITTS staff will also do their part.

13.03 Training & Documentation

Training for ITTS staff and written documentation costs should be incorporated into each phase of the project.

13.04 Payment

- ALA will pay invoices received from vendor within 30 days from the date of receipt. In the event ALA disputes one or more items contained in an invoice, ALA would, within 15 days of receipt of such invoice, notify vendor of the item or items under dispute and the reasons for the dispute. Any undisputed amounts would be paid within the 30 days.
- Out-of-pocket expense agreed to by ALA and the vendor will be reimbursed based on actual cost and upon receipt of documentation of expenses.
- Work performed by vendor outside of the scope of project and the contract must be approved in advance by ALA, in writing, after review of the rate for the work to be performed and the timeframe for completion.

13.05 Legal

- Vendor agrees to keep and maintain strictly confidential all data, information, and activities of ALA and/or its affiliated organizations, which may be revealed to vendor during the course of work or contained in this RFP. Vendor also agrees to defend, indemnify, and hold ALA harmless from any claim or action resulting from a breach of this confidentiality obligation. The vendor must sign a confidentiality agreement.
- In the performance of all work, vendor is an independent contractor and will not be considered an employee or agent of ALA. As an independent contractor, vendor is responsible for any and all employment related taxes and workers' compensation coverage. Vendor also agrees to accept liability for and will indemnify ALA against the payment of any and all contributions, assessments, rates and taxes, of whatsoever kind or nature, which might be imposed or attempted to be imposed upon ALA pertaining to the compensation paid or to be paid in connection with the services rendered to ALA, including but not limited to federal, state, county, city or other income, unemployment (FUTA), social security (FICA) taxes.
- ALA will request from the vendor tentatively selected an audited financial statement prior to signing a contract. The officer designated to review the document will sign a non-disclosure agreement.
- Optional, but desirable: Share your 18 month - 5 year business plan with ALA. The person designated to review the document will sign a non-disclosure agreement.

13.06 Questions & Inquiries

Questions and inquiries should be submitted before January 25, 2010. A webinar of the existing site and/or CMS is a possibility. Contact:

Louise Gruenberg
Sr. Usability Officer
American Library Association
50 E. Huron St.
Chicago, IL 60611
312-280-1395
lgruenberg@ala.org

13.07 Responses

Your proposal should address the issues raised in the RFP, and include the items from 13.08 to 13.12, ideally in the same order as they are listed here.

To respond to this RFP, submit an electronic copy of your response on or before February 15, 2010, sent to lgruenberg@ala.org, tsmith@ala.org and svanyek@ala.org. Use ALA CMS Proposal as the subject line. Please save files using: ala-yourcompanyname-cms-proposal.

All proposals and attachments will become the property of ALA as permitted by law. Bidders must identify those portions of their proposals that they deem to be confidential, proprietary, or trade secrets. ALA will make every reasonable effort to honor such confidentiality in accordance with statutory requirements.

13.08 Company Profile

Please provide all of the following information about your company in an appendix to your proposal. If you plan to partner with another firm or consultant, provide additional profile information for them.

- Business structure (type of entity) and ownership
- Number of years in business
- Primary and secondary businesses
- Location/address
- Hours
- Total number of full-time employees
- Individuals to be assigned this project, with experience level and biography

13.09 Expertise

Please answer the following questions regarding your plan for the work proposed.

1. Describe your experience with and expertise in working with content migrations, in particular with implementations that utilize extensive customization.
2. Have you helped clients simplify complex implementations by providing better solutions? Describe.
3. Discuss your capability and experience with building systems that integrate web services.
4. Describe your proposed system's flexibility and available options for add-on capabilities (include adding variables to existing fields and creating new fields and query parameters, as well as modifiability of metadata).
5. Tell us how your plan/product will future-proof us. We would rather not have to perform another content migration for a significant period of time. What is it about your plan that will make it possible for us to economically keep our site and our CMS up to date for years to come?

6. Describe your experience in building a way that content managers can create search interfaces for the display of materials from databases.
7. Optional but desirable: Describe your experience in implementing digital archives.
8. Provide samples of standard documentation, including tutorials, help files, and FAQs.
9. Describe your contingency plan for any situation in which a key member of your development team would become unavailable to continue work on this project.
10. Describe a plan for maintenance and enhancement of the system.
11. Describe your company's communication methods for reporting technical problems to ALA ITTS.
12. Describe any unique features that your company can offer that we should consider. What haven't we thought to ask?

13.10 Project Plan & Timeline

Describe how your company will approach this project, with complete details and timeline.

13.11 Cost Estimate

Please provide quotes (cost, time, resources, or procedures as indicated) for each component of the project as described in the *Scope of Project* section, above.

1. Cost of project (include hourly fees and timeframe for project completion. If more than one person is involved, include fee schedule of each person).
2. Number of hours (broken down by implementation timeline).
3. Number of personnel involved.
4. Due to the nature of the work, many technical projects run over budget. Provide a contingency fund amount that it would be desirable to have available in case of unforeseen problems or scope creep, based on your experience with this type of project.

13.12 References

Please provide complete information on three clients for whom you have implemented content migrations. Include the following information about each reference:

- Company name, address, contact person, telephone number, email, and URL for site worked on;
- Description of work performed and tenure of service to client; and
- Description of the level of complexity involved in migrating the site and integrating with web services.

Appendix A: Background on ALA

The American Library Association's mission is to provide leadership for the development, promotion, and improvement of library and information services and the profession of librarianship in order to enhance learning and ensure access to information for all. Founded in 1876, we are the oldest and largest national library association in the world. Our concerns span all types of libraries: state, public, school, and academic libraries, and special libraries serving persons in government, commerce, and industry, the arts, the armed services, hospitals, prisons, and other institutions.

ALA has about 65,000 members in the United States, Canada, and over 115 countries. Approximately 5,000 members are actively involved in the work of the association, via the Council, Executive Board, Division Boards, and through a network of established committees.

With a membership of libraries, librarians, library trustees, and other interested persons from every state and many countries of the world, the association is the chief advocate for the people of the United States in their search for the highest quality in library and information services. We maintain close working relationships with more than 70 other library associations in the United States, Canada, and other countries, and work closely with many other organizations concerned with education, research, cultural development, recreation, and public service.

In order to meet the needs of its varying constituencies, ALA has developed into a complex organization with an array of membership units, including the ALA Council (the overall governing body), the Executive Board (central management body), ALA committees, 11 Divisions, 17 Round Tables, and 57 autonomous chapters of the ALA, each with its own elective structure, as well as 25 offices (units providing programmatic or internal support services).

Divisions have a type-of-library or type-of-library-function specialization. They charge dues, publish journals, books, newsletters, and other materials; provide continuing education in a variety of venues and formats; offer awards and scholarships; sponsor institutes and conferences; and maintain networks of affiliates, chapters, and other collaborative relationships. Division staffing varies based on the size of the division.

Round Tables are membership groups. They may charge dues, develop programs, issue publications and affiliate with regional, state or local groups with the same interests. Round Tables do not have staff but are supported entirely by member-volunteers.

The purpose of a chapter is to promote general library service and librarianship within its geographic area and to cooperate in the promotion of general and joint enterprises within ALA and other library groups. Chapter membership is not limited to members of ALA.

Offices address broad interests and issues of concern to ALA members. Offices do not have members but are advised by member advisory committees. Offices may administer awards, grants and scholarships, issue publications, and develop programs. Some offices exist to provide internal support services to ALA staff.

The ALA staff (including all division and office staff) totals about 270 persons. Office locations include a small publishing enterprise in Connecticut, a lobbying and public policy office in Washington, D.C., one division headquarters in Philadelphia, while the balance of the divisions

and offices are at our main headquarters in Chicago. NB: The term Units is used as a catchall for referring to offices and divisions.

Appendix B: Content Management at ALA

ALA units have a great deal of autonomy in their approach to content management. The vast majority of ALA's content managers are content experts, not mark-up experts. They tend to be unfamiliar with HTML, XHTML, XML, CSS and CF, although some of the division staff web developers are an exception to the rule. Site content is freely added to the existing system by about 80 staff members and 200 member-volunteers, who have permissions set to allow access to certain parts of the site. Content is frequently created using proprietary software, and despite admonitions to the contrary, is often pasted into place, overriding the CSS with undesired font tags. Currently, over 24,000 files are modified and 34,000 assets are created per year, and content managers often upload Adobe PDF and/or MS Word files rather than create an XML page. There is an online style guide, but it is not always adhered to, so we are planning to consider some way to assess content editor knowledge before allowing access to the new system.

Appendix C: Website Traffic

The ALA website averages more than 6 million site visits and about 19 million page views per year. Visitors come from 226 countries; however 87% are from the United States. Site visitors use 182 browser and operating system combinations, although Internet Explorer on Windows accounts for 62% and Firefox on Windows for 23% of traffic. During the most recent month of traffic, IE use broke out like this: 40,556 visitors used IE 6, 146,853 used IE 7, and 96,211 used IE 8 to traverse the site.

Appendix D: ITTS Staff for Project

- Sherri Vanyek, Director of ITTS, contracts and payments
- Tim Smith, Assistant Director, applications, databases, servers and security
- Louise Gruenberg, Sr. Usability Officer, project manager, information architecture, usability, accessibility, implementation and migration
- Jenny Levine, Internet Development Specialist & Strategy Guide, administrator of ALA Connect, project manager for enhancements to the Drupal-based application
- Sheila Joy, e-Learning Specialist, staff and member-volunteer training
- Sean Bires, Web Design Specialist, front line helpdesk, assistance with implementation and migration, assistance with e-learning resource development