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REQUEST FOR PROPOSAL

Response requested by 7/12/04

RFP Overview

The American Library Association is seeking a vendor to build and implement a browser-based online community application in order to enhance member communication and collaboration. The completed product will be fully owned, hosted, and maintained by ALA staff.

Introduction to ALA

Organizational Overview

The American Library Association (ALA), founded in 1876, is the oldest and largest national library association in the world. Its concerns span all types of libraries: state, public, school and academic libraries, special libraries serving persons in government, commerce and industry, the arts, the armed services, hospitals, prisons, and other institutions. ALA has more than 65,000 members in the United States, Canada, and over 115 countries. The mission of the Association 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.

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. The Association maintains a close working relationship with more than 70 other library associations in the United States, Canada, and other countries, and it works closely with many other organizations concerned with education, research, cultural development, recreation, and public service organizations concerned with education, research, cultural development, recreation, and public services.

In order to meet the needs of its varying constituencies and their concerns, ALA has developed into a complex organization with over 270 staff in 3 locations (Chicago, Washington, DC, and Connecticut). The groups below represent the governing bodies of the organization.

Council

The overall governing body of ALA is the Council, which is comprised of 182 members including 100 members elected at large, 53 chapter representatives, 11 division councilors, 6 round table representatives, and the 12 members of the Executive Board.

Executive Board

The Executive Board is the central management body of ALA comprised of the elected officers, the immediate past president, and 8 members elected by Council from its members.

ALA Committees

ALA Committee members are appointed by the president and are responsible for library- and Association-wide concerns. The number of members serving on these committees varies from year to year.

Divisions

ALA has 11 divisions with responsibility for specific areas. Each has an elected board of directors, and such committees and sections as are required to accomplish the goals of the respective divisions.

Round Tables

ALA's 17 Round Tables include areas of librarianship outside the scope of the divisions. The Round Tables have individually elected governing bodies.

Chapters

There are 57 autonomous chapters of the ALA, each with its own elective structure. Chapters are geographically based and are responsible for promoting librarianship within their region.

Technology Overview

Desktop Hardware/Software

Headquarters Office - approximately 300 PCS

Washington Office - approximately 30 PCS

Connecticut Office - 25 PCS

Workstations: PCS – Pentium 4, 800mhz and above

Operating System: Windows XP and Windows 2000 (moving to Windows XP)

Office Software: Microsoft Office 2000

Other Software: Desktop Publishing applications (InDesign, Quark, Framemaker)
Internet Explorer, Mozilla, GroupWise Email 6.5, Symantec Virus Protection, Crystal Reports

Network

Operating System: Novell 6.x, Windows NT/2000 application servers

Topology: 100BaseT Ethernet, 3 - T1 lines to Internet

Servers: 15 Windows NT/2000 servers, 7 Novell servers, 2 Linux servers performing network, communications, email, and application functions running HP/Compaq Proliant hardware

Core Business Applications

Association Management:

iMIS 4.41 Association Management System 130 user license (MSSQL 7.0) – used for both billing and A/R

Web Applications:

Web Content Management System (MSSQL 2000, Cold Fusion 5.x with ActiveMatter, IIS 5.0)

Estore (Tango 2000, MSSQL 7.0, IIS 5.0)

WebCT Courseware 4.10.20 Campus Edition (WebCT on Sun Microsystems 9.x)

List Processors (ListProc 8.1 on Linux 2.x and Sympa 3.x on Linux 2.x)

Accounting:

GEAC SQL Financials 6.0 (MSSQL 7.0)

ADP 4.x

HR Perspective 4.x

WAI Accessibility Guidelines

The online communities' Web site design and information architecture will need to meet ALA's compliance with W3C's Web Content Accessibility Guidelines. ALA Web policy requires compliance with W3C's *Web Content Accessibility Guidelines* for Priority I and II, including:

1. Providing content that, when presented to the user, conveys essentially the same function or purpose as auditory or visual content.
2. Ensuring that text and graphics are understandable when viewed without color.
3. Marking up documents with the proper structural elements. Control presentation with style sheets rather than with presentation elements and attributes.
4. Using markup that facilitates pronunciation or interpretation of abbreviated or foreign text.
5. Ensuring that tables have necessary markup to be transformed by accessible browsers and other user agents.
6. Ensuring that pages are accessible even when newer technologies are not supported or are turned off.
7. Ensuring that moving, blinking, scrolling, or auto-updating objects or pages may be paused or stopped.
8. Ensuring that the user interface follows principles of accessible design: device-independent access to functionality, keyboard operability, self-voicing, etc.
9. Using features that enable activation of page elements via a variety of input devices.

10. Using interim accessibility solutions so that assistive technologies and older browsers will operate correctly
11. Using W3C technologies (according to specification) and follow accessibility guidelines. Where it is not possible to use a W3C technology, or where doing so results in awkwardness, provide an alternative version of the content that is accessible.
12. Providing context and orientation information to help users understand complex pages or elements.
13. Providing clear and consistent navigation mechanisms -- orientation information, navigation bars, a site map, etc. -- to increase the likelihood that people will find what they are looking for at a site.
14. Ensuring that documents are clear and simple so they may be more easily understood.

For more information about these guidelines please go to <http://www.w3.org/WAI>. Furthermore, the completed project should be compatible with all common browsers and computer platforms/operating systems.

Technical Expertise of ALA Staff

Assistant Director, Information Technology & Telecommunication Services - Primary point of contact for database interfaces using Microsoft SQL 7.x and 2000. Years of experience: 6

Manager of Web Development – Primary point of contact for web-based development. Experienced Cold Fusion developer using Microsoft SQL 7.0, 2000, and Access 2000 databases. Years of experience: 3

Web Developer - Accountable for the overall development, configuration, deployment, and administration of all installed Web applications. Experienced Cold Fusion developer using Microsoft SQL 7.0, 2000, and Access 2000 databases. Years of experience: 6

Web Administrator - Accountable for the overall system support and configuration for large diverse web sites and two list processors (ListProc and Sympa). Experienced Cold Fusion developer using Microsoft SQL 7.0, 2000, and Access 2000 databases. Years of experience: 3

Network Administrator – Accountable for firewall and TCP/IP infrastructure. Experienced Novell and Microsoft network engineer. Years of experience: 8

Scope of Project

Outcomes:

ALA's online communities will be available to ALA personal members only, on an opt-in basis. ALA membership can be validated from our iMIS database. All ALA personal members have a login and password stored in iMIS that is used with our Web site; the login and password should be the same for their online communities. ALA web policy requires that all applications authenticate against our iMIS database, and after the first successful login, that all applications will share authenticated credentials such that the user log in only once per session.

Access to and the ability to establish communities is based on different membership and appointment combinations. For example, some communities will require a committee appointment and some will require membership to multiple division sections (intra- and inter-divisional).

To launch a new community, individual users may complete a form including the community's name, purpose, suggested ALA unit/section sponsorship(s), membership requirements (unit memberships, appointment to groups), interest areas, and access-level (open to all memberships, select units, group-only).

Once a user establishes a community, the user will be asked to complete an online moderator training developed by the Consultant. The sponsoring unit(s) global administrator(s) will be notified of the petition by email. The community will not go live until the global administrator has approved the petition and moderator via an online administrative interface.

The communities' environment will have an active database of moderators. Some moderators will be added as they are approved from a petition to establish a community, and global administrators may add others from a pool to specific unit groups unable to moderate. We have provided an appendix that provides a "vision statement" of what we expect in terms of outcomes based on a survey taken of ALA members.

Features:

Please quote cost and development time for each item below separately in your proposal. This list should not be construed as limiting in what you may be able to offer but represents expectations, not requirements. We would like as much as possible to choose from whatever is considered "state of the art" in terms of community functionality.

1. **Threaded Discussion.** Also described as bulletin boards, topics can be created by members and others can reply. Feature-rich discussions should accommodate emoticons, sharing active links, avatars representing the member, quoting other posts, and preview/edit/postpone/delete capability pre-posting. Attachments are not allowed. User may set preferences to access (send, receive) messages via

- private email account as individual message or digest format, or access messages via the web only. Moderator should be able to tag postings to a dynamic FAQ of the community. ALA is considering the use of Sympa to replace ListProc for list management outside of the online communities. Integration with or replacement of Sympa is a vital consideration.
2. **Shared Links.** A section of each community should allow members to share links to other web sites. Each shared link should require and display a URL, site name, and an annotation.
 3. **Shared Files.** A section of each community should allow members to share uploaded files. Each shared file should require and display a filename, a document name, and an annotation. ALA will provide the Consultant with a list of acceptable file types. The upload feature should integrate virus scanning software.
 4. **Event Calendar.** Each event should be required to display a date, beginning and end time, time zone, a name, and an annotation. Users should be able to add events to a calendar at three different levels:
 - Private: Events added with this status will only be visible to the individual user.
 - Community: Events added with this status will be visible to the community.
 - Global: Events added with this status will be visible to everyone in all communities. The ability to add Global events should be available only to Global administrators (see Security). The ability to submit to Global administrators events appropriate for Global visibility should be available to any member.

Users should have the ability to compile and export community calendars to desktop and PDA (both PocketPC and Palm formats preferred).
 5. **Chat.** Synchronous discussion system that allows any community member to initiate a chat with any combination of the following options:
 - Private chat between invited members of a community
 - Open chat for all members of a given community
 - Chat open to all ALA members
 - Real-time and saved transcript of session
 - Moderated chat (a moderator must approve each post to a chat)

Within a given chat session, the following options should be available:

 - Block a user/Ignore a user
 - Move to “executive session” (block unauthorized participants and suspend transcript)
 - Send working URLs within chat
 - Format text (bold, color, etc.)
 - View list of current chat participants
 - Link to current participants’ profiles [described below]

Chat should not support file sharing or images.
 6. **Archives.** Archives of each community should be both searchable by keyword using Boolean logic and browsable by either date or subject (ALA will provide a controlled vocabulary for subjects). The archives should include all threaded discussions, shared files, shared links, and chat transcripts. Users should be allowed to limit their search to a specific community, or to search globally across

- all committees, with the understanding that the user will not be able to view search results for communities if s/he is not a member. There should be some sort of visual cue or icon displayed to indicate that a search result is unavailable to the person searching.
7. **Polling.** Simple multiple-choice polls allowing only one vote per member can be created. The moderator should be able to designate each poll as anonymous (user ID is not connected to the specific vote) or recorded (each user's vote is visible to all members of that community). Global administrators should be allowed to "push" a poll to all communities.
 8. **Member Profile/Business Card.** Each member should have a profile, with the following fields, which should be customizable so that users can choose which are public within the community environment:
 - Username (this is the only required field and should be auto-generated from iMIS)
 - Image (.gif or .jpg)
 - Email address
 - Web URL
 - IM screen names (Yahoo!, AOL, ICQ, etc.), possibly with indicators of online status within each IM application
 - ALA Community online status
 - Unit, section, and group memberships (auto-generated from iMIS)The email address should be pulled from iMIS.
 9. **White Board.** Group members are enabled to work together on a common document using file sharing and software tools.
 10. **Online Status of Members/Who's Online.** Members should have the option to display a list of community members currently logged into ALA's Online Communities, with option to initiate private/individual or community online chats.
 11. **Help.** On every page of the community, a link to online help should be available. Online help should include contact information for ALA staff as well as documentation for using ALA Online Community features. ALA staff should be able to edit this documentation.
 12. **Ability to Integrate RSS.** All static/asynchronous features should be available via syndicate.

Security:

ALA would like three levels of security available within online communities.

1. A **user** should be able to:
 - Create and participate in threaded discussions
 - Add shared links
 - Add shared documents
 - Add personal and community items to the calendar
 - Submit for approval items to post to the global calendar
 - Initiate, use, and save the white board
 - Access and search the archive

- View a list of who's online
 - Open a private chat or a community-only chat
2. A **moderator** should be able to:
- Do anything a user can do
 - Invite members to join community
 - Remove members from community
 - Designate which features should be viewable by non-member of particular community
 - Delete or edit postings to any features
 - Start a community-only poll
 - Open a chat for non-community-member observers
 - Save the log of a chat to the archive
 - Open a moderated chat
 - Create dynamic FAQs
 - Tag, edit, post to FAQ in thread discussions only.
3. A **global administrator** should be able to:
- Do anything a user or moderator can do
 - Push events to the global calendar
 - Push polls to all communities
 - Create and auto-populate communities based on membership and/or sponsoring unit requirements as stored in iMIS.
 - Push community membership invitations via email based on iMIS info and then populate the communities when members opt in.
 - If Sympa is not used, accommodate institutions with multiple outgoing mail servers (which sometimes changes the appearance of sender's email address).

Administrative Guidelines

Deadlines

ALA is working with a short development cycle on this project. All work must be completed and ready for beta-test by October 31, 2004.

Testing

ALA's complex organizational structure necessitates a minimum of three weeks of beta-testing. The beta-test will likely result in extensive feedback and changes for the Consultant, which should then be followed by acceptance testing.

A schedule for both beta and acceptance testing will be included in the final contract between ALA and the Consultant.

Maintenance/Upgrades

Please provide an overview of upgrade plans and projected maintenance costs, if any.

Training

Consultant should provide initial training for ALA staff, customized to ALA's needs based on the final specific product.

Consultant should also provide an online training module for moderators and global administrators, as well as a downloadable PDF reference document.

Consultant should auto-populate the Shared Files portion of each community with a quick-reference "How To" guide for community users.

Consultant should provide full documentation, documented source code, and plan of implementation; all original graphics should be provided in Photoshop-editable format.

Payment

ALA will pay invoices received from Consultant 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 Consultant 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 Consultant will be reimbursed based on actual cost and upon receipt of documentation of expenses.

Work performed by Consultant 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.

Legal

The laws of the State of Illinois will govern any Agreement or Contract with Consultant.

Consultant agrees to keep and maintain strictly confidential all data, information, and activities of ALA and/or its affiliated organizations, which may be revealed to Consultant during the course of work or contained in this RFP. Consultant also agrees to defend, indemnify and hold ALA harmless from any claim or action resulting from a breach of this confidentiality obligation.

To guarantee that the confidentiality of specific information contained in ALA's Online Communities, the Consultant must be willing to sign a confidentiality agreement.

In the performance of all work, Consultant is an independent contractor and will not be considered an employee or agent of ALA. As an independent contractor, Consultant is responsible for any and all employment related taxes and workers' compensation coverage. Consultant 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.

Proposed Work and Services

Submission of Proposal

Please submit an electronic copy of your response to the RFP **by July 12, 2004**, sent to dvicha@ala.org and svanyek@ala.org . Quotations received after this date/time will not be considered.

Company Profile

Please provide all of the following information about your company in your proposal.

1. Number of years in business.
2. Primary and secondary business.
3. Is the company wholly owned?
4. Location/address.
5. Hours of availability and expected response time to inquiries both during business hours and after normal work hours
6. Total number of full-time employees.
7. Individual(s) to be assigned this project.
8. Experience level and work/project histories of individual(s) assigned to this project.

Please respond to the following, regarding your plan for the work proposed.

1. Describe your experience with and expertise in working with iMIS, in particular with iMIS implementations that utilize extensive customization and take advantage of the majority of the available modules. Your work with the iBOs is also of interest to ALA. In the event you have no expertise with iMIS, describe ability to forge working relationships with third-party consultants conversant with iMIS.
2. Will any third-party or non-proprietary software (not currently in use by ALA as listed in the technical specifications) be required in the implementation of this system? Provide information on any third-party software requirement.
3. 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 in terms of adding new modules). Describe contingencies regarding use of Open Source code, expertise in event the code becomes orphaned, annual fees, etc.
4. Describe your interface design features and options for integrating graphics/artwork, logos, and/or departmental designations.
5. Describe your company's communication methods for reporting technical problems to ALA IT and non-IT staff.

6. 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.
7. Describe a plan for maintenance and enhancement of the ALA Online Communities.

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.

References

Please provide complete information on five clients for whom you have created an online communities application; if your work for the client did not entail creating an online communities application, explain how the work performed is similar to that related to developing an online communities application. Include the following information about each reference:

- Name, address, contact, and telephone number.
- Description of work performed and tenure of service to client.
- Description of the level of complexity involved in integrating the client's web application with their iMIS database.

Please include at least one reference from a not-for-profit organization.

Appendix A.

Online Communities Vision Statement

Based on their comments to a recent survey, many ALA members welcome the opportunity to participate in online communities, including the ability to hold threaded discussions and live chats, to learn of ALA news and events, and to accomplish at least some of their committee and other group work in a shared online workspace.

Numerous electronic communications opportunities already exist between members and the Association, among them opt-in email notifications of events and CE opportunities (for example), hundreds of discussion lists, and “MyALA,” where members can customize their experience of the Association’s website. Members would like “one-stop” or “one-login” access to all of these offerings. Seamless integration of online community discussion threads and shared workspaces, discussion list output, website access, and instantly-available information regarding the member’s “place” in the mix of ALA communications and membership opportunities is a worthy goal to keep in mind.

Members specifically do **not** want yet another login to remember, nor do they want yet another place to look for communications with ALA. They want easy, direct online interaction with the organization, and they want to be able to control their online interactions to their satisfaction. It is important that any system chosen allow participants to choose whether or not to participate.

An ideal scenario would be for the user to have one simple address to remember for all interactions with ALA. By accessing this address and entering their universal (to ALA) ID and password, users would then be able to pick and choose from a wide variety of communications options: threaded discussions, the latest shared documents pertaining to their committee work, web access to discussion list postings, live chat with other committee members or online community members, etc. Their choices should be supported and enabled by information about their current status within the organization: which online communities to they belong to, yes, but also which discussion lists are they subscribed to, which divisions and round tables they belong to, what committees are they on, what their current communications preferences are (both with ALA and with other community members – e.g., “I do not currently wish to receive mail or email from organizations other than ALA, nor do I want to appear visible to others in the online community system right at the moment...”). User experience should also be informed by the status of others online at the moment: what chats are going on and who is participating, who is online to chat with, and are they interested in chatting? Members should receive timely notification of online events they have signed up for, and should be able to specify how and when such notifications should appear.

Members should have some ability to customize their “space” in the online communities system. The best example of this type of customization is “MyYahoo!,” where users have the ability to choose which types of information they wish to appear on their “home page” and to further specify individual items within those categories. For example,

MyYahoo! users can choose to see new music releases for this week and next week, but can further choose whether they want to see listings in classical, pop, country, etc. While this may be a bit beyond the scope of the current system, it's conceivable that users might one day want the ability to select "division news and website updates for ALCTS, but only for these three sections or committees..." Or, they might want to have an RSS feed going from LITA in one corner of the screen, while they participate in a chat in another portion of the screen.

Further, within Yahoo! Mail, users have the ability to select from a limited number of color schemes for the mail interface. This sort of customization doesn't necessarily make or break people's satisfaction with a system, but elements under the user's control, however small, give the user the feeling that they are in charge, which *does* contribute to satisfaction -- especially in an organization the size and complexity of ALA, where members may feel powerless to effect change.