



50 E. Huron • Chicago, IL 60611-2795

REQUEST FOR PROPOSAL

Response requested by February 18, 2008

RFP Overview

The American Library Association is seeking an experienced Drupal site developer (either an individual contractor or a consulting company) to build and implement an online community service using Drupal. The objective of the project is to provide a platform to enhance member communication and collaboration. The completed product will be fully owned by ALA. Whenever possible, new modules created for the project will be released to the Drupal community in accordance with the GNU General Public License. The project has a short development cycle, and the selected contractor or company must be able to work to the following deadlines.

Project Deadlines

Project to commence on March 3, 2008, with principal work to be completed by June 6, 2008. Documentation and training to be completed by June 6, 2008.

Background

ALA currently maintains an “online communities” service running on DotNetNuke software using SQL Server, integrated with our association management software. It offers the following features:

| | |
|---|--|
| <p>Communication Modules</p> <ul style="list-style-type: none"> • Announcements • Contextual help • FAQs • Member search • Online status • RSS feeds (both displaying external feeds & generating internal ones) • Search across all communities • Welcome message | <p>Interactive Communication Modules</p> <ul style="list-style-type: none"> • Chat • Discussion forums (with opt-in subscriptions by email) • Document & file repository (upload & download) • Messaging (email) within the system • Surveys & voting |
| <p>Planning & Organization Modules</p> <ul style="list-style-type: none"> • Contacts (name, phones, email) • Event calendar • Tables | <p>Site Administration Features</p> <ul style="list-style-type: none"> • Changeable community status (open to closed & back again) • Customizable user roles & permissions • Default community with installed modules • Module inserting, moving, deletion & restoration (from recycle bin) • Module permissions • Navigation options for left hand, dropdown & top navigation • 30 days of usage statistics |
| <p>Display Modules</p> <ul style="list-style-type: none"> • Framing an HTML page • Linking to external sites | |

Scope of Project

1. Developer will install, configure, create, modify and document necessary software and modules to migrate ALA's current Online Communities service to Drupal to replicate existing functionality (listed above).
2. Developer will add new features (listed below).

- Whenever possible, Developer will migrate existing content from the DotNetNuke installation into the Drupal site.

New Features & Functionality

| | |
|---|---|
| <p>Web 2.0 Features</p> <ul style="list-style-type: none"> • APIs for interaction with external sites (Facebook, Flickr, Mediawiki, etc.) • Blogs • Collaborative web pages/documents, including versioning • Embedded content (Flickr pictures, YouTube videos, etc.) • Surfacing of relevant communities to members based on interests noted in their profiles • Tagging and tag clouds for nodes • Wiki functionality or integration | <p>Interface Interaction Options</p> <ul style="list-style-type: none"> • Ability to opt-in to forward messages to personal email, or just use of personal email instead of an internal messaging system • Advanced member search • Dashboard page to show most current content from communities member has joined • Enhanced member profiles • Font size widgets that let members set the text size for their own individual taste |
| <p>Sitewide Features</p> <ul style="list-style-type: none"> • Archiving of all content • Contextual help • Media support (audio, video, screencasts, etc.) • Photo/images galleries, integration of content from Flickr, and image resizing • Spellcheck • WYSIWYG editor that adheres to the WAI Guidelines outlined in Appendix A | <p>Backend Functions & Features</p> <ul style="list-style-type: none"> • Ability for each community to choose a default theme or use one of their own design • Caching and/or other techniques to improve performance • Default community with full functionality designed in conjunction with ALA's trainer • Usage statistics |

Single Sign-On & Integration with Existing Services

The Drupal installation should not generate a separate login and password for our members. Developer will connect Drupal to our association management software (iMIS) to allow single sign-on with our website. Members should be able to view, update, and delete their profile information in real-time, as well as move seamlessly between our website and Drupal.

Developer will also integrate the following existing ALA services via existing Drupal modules:

- Mediawiki
- Moodle
- OpenAds
- Sympa
- WordPress
- Urchin

User Permissions

Developer will implement the following types of user permissions within Drupal for content types:

- Registered user = can read any community designated as “public”
- Member = can read any community designated as “public” or “member-only” and “open” and can create a community (that they then become the member administrator of)
- Member author = can read and contribute to any community the user has access to, including “closed” communities
- Member moderator = can read, contribute to, and moderate any community the user has appropriate access to, including “closed” communities
- Member administrator = can read, contribute to, moderate, suspend, and administer any community the user has appropriate access to, including “closed communities”
- Staff moderator = can read, contribute to, and moderate any community the user has appropriate access to, including closed communities
- Staff administrator = can read, contribute to, moderate, create, suspend, and administer any community the user has appropriate access to, including “closed communities”
- ITTS administrator = has full access to read, modify, contribute to, moderate, create, delete, suspend, and administer any community

Site Interface

A third party will be developing the interface for this site. Developer will work closely with consultants from third party to implement the final design as a theme so that it is accessible in

accordance with Appendix A. In addition, site must work the same in Internet Explorer 6+ (for Windows users) and Firefox 2+ (for Windows and Macintosh users).

Developer will work closely with ALA's Usability Officer to make sure the site is usable and streamlined.

Selection Criteria

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

- CSS
- Drupal theme design
- Javascript
- PHP
- MySQL
- XHTML
- XML
- 3-5 years of experience in programming
- 1-2 years of experience developing with Drupal
- Experience connecting to iMIS association management software
- Project management skills, including the ability to work within deadlines
- Strong ability to communicate with staff and clearly document work
- Thorough knowledge of WAI Guidelines and experience creating Drupal sites that adhere to them

Administrative Guidelines

Deadlines

ALA is working with a short development cycle on this project. Initial installation and configuration will begin by March 3, 2008, with beta testing of five communities to begin in March. Principal work must be completed by June 6, 2008.

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 Developer, which will be followed by acceptance testing.

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

Training and Documentation

Developer will provide initial training for ALA staff covering basic administrative tasks for maintenance of the site.

Developer will fully document all modifications of existing modules and creation of new ones in the source code.

Developer will provide written documentation for all modules, databases, and other elements used in the installation.

While ALA staff will maintain administrative oversight of the Drupal installation, day-to-day use and management will be performed by members. Therefore, Developer will need to provide clear, concise documentation for any new modules created for this project, as well as instructions for any changes in usage of existing Drupal modules that are implemented. Developer will work closely with ALA's trainer so that she can create documentation and instruction that is user-friendly and practical.

Payment

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

Work performed by Developer 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 Developer.

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

To guarantee the confidentiality of specific information contained in ALA's Online Communities, the Developer must sign a confidentiality agreement.

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

Questions and Inquiries

Questions and inquiries for further information should be submitted before February 14, 2008, and should be directed to:

Sherri Vanyek
Director of Information Technology and Telecommunications Services
American Library Association
50 East Huron St.
Chicago, IL 60611
(312) 280-2437
svanyek@ala.org

Responses

To respond to this RFP, submit an electronic copy of your response before February 18, 2008, sent to svanyek@ala.org and jlevine@ala.org. Quotations received after this date may not be considered.

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 information or trade secrets. ALA will make every reasonable effort to honor such confidentiality in accordance with statutory requirements.

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.
6. Total number of full-time employees.
7. Individual(s) to be assigned this project.
8. Experience level and biographies of individual(s) assigned to this project.

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

1. Describe your experience with and expertise in working with Drupal, in particular with implementations that utilize extensive customization and take advantage of the majority of the available modules.

2. Describe your company's communication methods for reporting technical problems to ALA IT and non-IT staff.
3. 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.
4. Describe a plan for maintenance and enhancement of the ALA Online Communities.
5. Describe any unique features that your company can offer that we should consider.

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 two clients for whom you have implemented Drupal installations. Include the following information about each reference:

- Name, address, contact, telephone number, email, and URL for site worked on
- Description of work performed and tenure of service to client.
- Description of the level of complexity involved in integrating various Drupal modules

Appendix A

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. Compliance with W3C's *Web Content Accessibility Guidelines* includes:

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 in grayscale..
3. Mark 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. Use 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 doing so results in material that does not transform gracefully, 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 a person 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>.

Appendix B

Introduction to ALA

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, 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. The 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.

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 of 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 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. In sum, approximately 5,000 members are actively involved in the work of the Association.

The ALA staff of over 270 persons consists of a small publishing enterprise in Middletown, Connecticut, a lobbying and public policy office in Washington, D.C., and the main headquarters in Chicago. The information needs of the staff are as broad as the Association's activities and also include association management issues such as meeting management, governing board operations, finance, and marketing. Most staff are "knowledge workers" with regular and frequent need to gather and synthesize data, information, and research in support of member activities or constituent information needs.