AMERICAN LIBRARY ASSOCIATION ECOMMERCE RFP

Release date: July 10, 2012 Responses due: September 10, 2012

PROJECT DESCRIPTION

The American Library Association (ALA) is seeking a vendor to replace our existing Active Matter, Cold Fusion eCommerce system, which provides join, renew, rejoin, add, register, subscribe, and donate functions, with an open source or licensed system (not Cold Fusion based) that provides those functionalities, has a shopping cart, and can read from and write to iMIS 15, our association management system, preferably using Microsoft SQL. Assume that ALA plans to provide its own servers in a Suse Linux or Windows environment.

Timeline: Work to commence in November 2012 and to be completed within ten months.

MUST PLAY NICELY WITH

- ALA's association management system, current version: iMIS 15.1.3.8125.
- The pricing rules reside in iMIS, which currently uses Microsoft SQL Server 2005 9.00.4053.00 (X64) *(MySQL is a less desirable option.)*
- Shibboleth 2.0 is ALA's single-sign-on system for authentication.
- ALA uses Drupal 7.7 for content management; if the eCommerce system proposed does not have its own CMS, it must be able to work with our Drupal CMS to display information on ala.org and connect.ala.org.
- Email server(s)

REQUIRED FEATURES

COMPLIANCE

System must comply with Payment Card Industry (PCI) security standards, allow PayPal, credit cards, electronic checks, and purchase orders.

System must comply with best practices in interaction design, usability and accessibility of the forms, shopping cart, account creation, login, and checkout processes required for the functions:

- join
- renew
- rejoin
- add

- register
- subscribe
- donate

MAINTENANCE

System must be capable of being maintained and updated primarily by the staff of the Office for Information Technology and Telecommunication Services (ITTS) at ALA, who should be able to make pricing changes, handle product setups, and provide access to content editors via settings in iMIS.

ITTS staff should be able to create new reports and modify existing ones that assist with system maintenance.

ALA staff with appropriate permissions should be able to manage most descriptive content and set up special pages even when working from outside the ALA network.

Desirable: Installation of third party instant messaging, chat, or screen capture capabilities for customer service assistance.

REQUIRED PROCESSING CAPABILITIES

System must be capable of handling the 3,464 existing pricing rules in MS SQL (1,491 of which are related specifically to ALA membership dues) and any future expansion of such rules required for the ongoing business of ALA. *(See Appendix A for sample rules.)* Many of ALA's pricing rules are based on dependency relationships. We are open to ways to simplify pricing rules based on promotional offers or other approaches.

System must allow installment payments for a select group of dues products.

System must process multiple transaction types during a single interaction: Customer joins, adds a subscription, and registers for a webinar all at once. *Specifically excluded: Anything not hosted within the e-commerce solution, such as major ALA and division conferences.*

DESIRABLE PROCESSING CAPABILITIES

Allows the renewal of all member types online, which requires the changing of a member type (from student to regular after the 5 year allowable period, for example) based on the pricing rules.

Processes multiple registrations or subscriptions (for example, 10 virtual conference attendees or subscribers from the same organization) during one transaction. Customizable fulfillment

emails and receipts must then be generated so that the email server can send to one or more recipients from a single transaction (e.g., receipt goes to one person at organization, unique confirmation messages sent to each registrant, subscriber, or new member).

Must allow event registration to remain active until a specified date and time, up to the start of time-based events, and have a permanently available setting allowing registration without time restrictions for recordings. (There must be an easy way to convert a time-based event record into a recorded event record.)

Members can opt-in to auto-renewal, and will get an email reminder/receipt to notify them that their card is going to be charged.

Generates email auto-reminders about credit card charges on installment payments.

ACCOUNT CREATION & MANAGEMENT

System must allow the creation of new accounts during the join, register, donate or subscribe process, rather than requiring it beforehand, and must allow login to existing accounts from the forms.

System must have a way to prevent the creation of duplicate accounts that does not expose personal information.

Desirable: Allows donations without iMIS account creation required (funds processed via a web-bucket account).

AUTHENTICATION

Via Shibboleth, against iMIS, for both purchasers and ALA staff and authorized vendors.

SHOPPING & CHECKOUT EXPERIENCE

The shopping cart must auto-refresh pricing and totals when additions or deletions are made, and be capable of referencing the special pricing rules (or their replacement) appropriately.

System must allow immediate access to digital resources upon payment by credit card, PayPal, or electronic check, but not provide such access to those paying with purchase orders. *(We are open to a system that allows us to limit the payment methods allowed for on-demand digital products.)*

System must allow end users to view their membership record and purchases and to enter online claims for subscriptions at any time. (Current system prevents viewing when there's more than 60 days remaining in their membership.)

System must allow end users to organize, view, and print their receipts within a date range or by a product type.

TARGETED MARKETING

System must allow cross-selling, up-selling, promotional codes, limited time offers, bundled deals, and other special offers.

System must be able to generate smart links for individual as well as bulk email messages.

System must allow multiple funding initiatives, the demarcation of priority initiatives, and allow the integration of targeted funding solicitations with new memberships and renewals.

System should allow ITTS staff to customize thank you and other form pages to feature targeted communications, special offers, and reminders. *"Other members of ALA and LITA also subscribe to TechSource …"*

System must have tracking and reporting abilities, including the ability to track promotions and special offers, or leverage Google Analytics or other tools to provide them.

Desirable: Imports membership lists from affiliates for use in discounted registrations.

DISPLAY CAPABILITIES

System must leverage the ease of editing and content display options available in our Drupal 7 websites or vendor must propose a viable alternative for site maintainers, editors and end users.

System must make it possible to aggregate information in various ways (by product type, unit offering, date, topic, etc…) for display on ala.org, connect.ala.org and other web and social media sites, using tools such as tagging, taxonomies, views, widgets (RSS, RDF, AJAX, SOAP, APIs or a comparable approach). For example an ALA unit's "give [unit acronym] button" on an external site should go directly to the display of all their giving options, based on taxonomy or tagging.

System must make it possible to select items (individual products, course or event registrations, fund-raising initiatives) to add to shopping cart from descriptive pages, navpods or widgets

installed anywhere on our Drupal 7x websites. It would also be desirable to be able to install such widgets on social networking sites.

System allows creation of ad hoc tribute or memorial pages. Funding initiative pages have the ability to incorporate a story (images and narrative).

Desirable: Allows the option of displaying and automatically updating registration counts on a web page. Automatically indicates "sold out" next to the event listing.

PROPOSAL FORMAT

Please include the following elements in your response to this request for proposal, in the order below.

SYSTEM DESCRIPTION & CONFIGURATION OPTIONS

Describe the system you propose to configure, and detail the web services or other methods required to read and write to iMIS. Touch on your plan for providing the required features described above, and describe any desirable or optional features included in your price. Describe the standard report options that will be available to ALA.

TESTING

Describe the plan for assuring that the system works properly, correctly applying pricing rules and providing access to site visitors using assistive technologies.

TIMELINE

Describe the proposed timeline for all phases of this project. When would you start work on the project? When would the project be completed? Will your approach call for an overnight launch or a phased approach? Be sure to include time for accessibility, interaction, and functionality testing.

COMMUNICATION & PROJECT MANAGEMENT

Identify the tool(s) to be used to communicate with ALA and manage the project.

WARRANTY & SUPPORT OPTION

While ALA's ITTS staff should be able to maintain and update the system on a day-to-day basis, assistance may be required for extraordinary circumstances and new features. Describe any warranty provided as well as your system support plan and terms.

While these features are currently out of scope, the system must be capable of being configured to produce these functionalities in the future. Briefly describe how the system and configuration proposed would make these options possible during a future iteration. *(Optional: Price one or more options.)*

- Sell and fulfill gift certificates.
- Product sales and integration with the ALA Store, http://www.alastore.ala.org/.
- Mobile capabilities.
- Integration with a licensed or open source Learning Management System.

Provide a total price and a breakout per phase for all requirements. If the proposed system is not open source, breakout any charges for licenses. Include pricing for follow-up support. *Optional: Pricing for desirable items and/or future capabilities.*

1. Provide information about your enterprise's legal structure, length of time in business, principal business activities, and other details you may wish to communicate.
2. Describe your enterprise's principals; also provide relevant background information on those persons likely to be assigned to this project.
3. Provide at least three references for similar projects. Describe any projects involving iMIS 15 integrations, even if they were not eCommerce related.
4. If your enterprise has been in business less than five years, be prepared to provide ALA with financial statements for the past three years.

QUESTIONS, DEADLINE & SUBMITTAL INFORMATION

Submit questions to Louise Gruenberg, lgruenberg@ala.org, 312-280-1395.

Proposals are due on September 10, 2012. Send your proposal electronically to svanyek@ala.org; tsmith@ala.org; lgruenberg@ala.org; jlevine@ala.org.

To prevent your proposal from languishing in a spam filter, leave a voicemail for Louise Gruenberg with the sent from email address information once you have emailed your proposal.

APPENDIX A: EXAMPLES OF SPECIAL PRICING RULES

MEMBERSHIP DUES EXAMPLES

The Online Member Application will allow ALA website users to apply for an ALA membership, renew an existing membership, add items during the renewal process, or rejoin after a lapse in membership.

Regular Members

When total years are 0 bill $65.00 when total years are 1 then $98.00 else $130.00.

Student Members

When total years are <5 bill $33.00 else $65.00.

Retired Members

Dues are $46.00.

AASL (ALA Division)

Must be a current member of ALA with a member type (Regular, Student, Retired, etc.).

Dues are $50.00.

ALA Continuing Member Type with 2 free divisions

Must be a current continuing member will get two free divisions and pay $25.00 for each additional one.

ACRL (ALA Division)

Must be a current member of ALA with a member type of Regular.

Regular Dues for ACRL are $56.00.

You get 3 free ACRL Sections or Interest Groups and each one after that is $5.00.

EVENT REGISTRATION EXAMPLE

YALSA's YA Lit Symposium

Default Pricing for Main Event is $300.00 for Early Bird, $350.00 for Regular Registration, and $375.00 for Late.

ALA Personal Member for Main Event is $245.00 for Early Bird, $295.00 for Regular Registration, and $320.00 for Late Registration.

ALA Student Member for Main Event is $50.00 for Early Bird, $50.00 for Regular Registration, and $75.00 for Late Registration.

YALSA Members for Main Event is $195.00 for Early Bird, 245.00 for Regular Registration, and $270.00 for Late Registration.

Default Pricing for a function like "Using Social Networking" is 59.00 for Early Bird, $59.00 for Regular, and $59.00 for Late Registration.

CONTRIBUTION

Minimum amount for a campaign.

Show previous donation amount.

Show donation total to date for a campaign.

DISCOUNTS

Need coupon codes for special deals.

APPENDIX B: ACCESSIBILITY REQUIREMENTS

ALA's web resources must comply with Web Content Accessibility Guidelines (**WCAG**) **2.0**; understanding the guidelines, a quick reference guide, and information on recommended techniques are available from the W3C Working Group.

APPENDIX C: ABOUT THE AMERICAN LIBRARY ASSOCIATION

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, 19 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, CT, a lobbying and public policy office in Washington, D.C., a division office in Philadelphia, PA 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.