American Library Association RFP for a SaaS Community Platform

Release date: May 4, 2015
Responses due: May 26, 2015, 9:00am CDT
Issued by ALA's Information Technology & Telecommunications Service unit (ITTS)

Project Description

The American Library Association seeks a vendor to host its professional collaboration and networking site, ALA Connect, which supports 2,600+ groups and 64,000+ users. Currently built in Drupal, ALA Connect allows users to post content to groups, join open groups, add members as friends, participate in a mentor matching service, and post a volunteer opportunity. In terms of collaboration, group tools currently include discussion forums, collaborative documents, files, polls, text-based chats, and calendars.

The new community and collaboration platform should incorporate the existing functionality and add new features that will drive member engagement, provide additional revenue opportunities, and allow members to display their professional contributions on their profiles. Our goal is to migrate existing content to a Software as a Service platform (SaaS) that integrates with iMIS, our Association Management Software (AMS).

Timeline

1. RFP published on May 4, 2015
2. Responses due by 9:00am CDT on Tuesday, May 26, 2015
3. Demos of first round candidates will take place May 27 - June 5
4. ALA will evaluate final candidates (June 8-19)
5. Contract to be signed by end of June
6. Work to begin mid-July
7. Launch date in late September or early October

Authentication & Integration

ALA uses Shibboleth 2.0 for Single Sign-on (SSO) across its web properties. Any community platform we implement must allow users to log in to the system using this method. User profile data will be maintained in ALA's iMIS database (version 20.1.x.x), and the data will be made available to the community platform via Shibboleth.

We are moving our membership dues and donations system to Drupal Commerce, and our job listing service is currently migrating to JobTarget/YMCareers. We have dozens of WordPress blogs and Mediawiki wikis, and while we currently use Moodle as our learning management system, we're

investigating alternative platforms for it. ALA's website is maintained in Drupal 7. We use Google Analytics for our various site statistics.

Please include in your proposal any integration work you've done with any of these platforms or services.

Accessibility Compliance

ALA's web resources must comply with Web Content Accessibility Guidelines (**WCAG**) **2.0**. If you're not familiar with this standard, please read understanding the guidelines, a quick reference guide, and information on recommended techniques from the W3C Working Group. If your service does not meet this standard and your company is not willing to work towards compliance, you should not respond to this RFP.

Required Features

Your response should include a line-by-line explanation of how your solution implements or addresses each of the following required features.

Groups & Group Collaboration

1. Content from the current Drupal-based ALA Connect can be imported into the same groups in the new system.
2. All basic functionality necessary to participate should be usable via email (post to group, receive content, reply to content)
3. Users can make content in any group public or private on a node-by-node basis
4. An ADA-compliant way for group members to collaborate on a document
5. Easy-to-create group polls (one question, one answer selected from a list of options) that includes areas for the question plus further description
6. Group calendars
7. Discussion forums for each group
8. A file repository for each group
9. Robust file folder management, including the ability to move folders (not just files) in a way that is ADA-compliant
10. Integrated text-based chat for groups
11. Group members can organize content by subject headings and/or tags
12. Group admins can set group membership to be open, moderated, or closed
13. Robust, full-text searching of content within a group, including within files, that respects group permissions
14. Revision history for collaborative documents and files
15. ALA members and staff should be able to create an unlimited number of groups
16. Users can suppress an email notification to the group when updating content
17. Ability for some group rosters to synchronize with iMIS while other groups can be created on-the-fly by members without a connection to iMIS for the roster
18. Robust statistical reports for group activity are available to group admins
19. Sitewide directory of groups that can be browsed or searched by unit, subject, or type of group

Profiles
1. Detailed profiles that members can easily update, with all data written back to iMIS
2. Members can set granular privacy settings on their profiles (e.g., show my publications publicly but show my past employers only to other ALA members)
3. Members can send a private message to another user through the system
4. Profiles include a section for "My CE" history that displays historical and current information from iMIS
5. Member profiles are historical CVs that display past ALA participation and contributions
6. Members can import data from LinkedIn to their ALA profile
7. Members can list and link to their accounts on various social media and websites

Member Engagement
1. A member directory with robust search and filters
2. Members can find other members with like interests
3. Members can find relevant groups based on interests and level of commitment required (e.g., virtual work, face-to-face meetings, etc.)
4. Personalized dashboard of the newest content from user's groups
5. Users can like/favorite/bookmark content and comments and share them
6. "Find an expert" database built on data from member profiles
7. Members can add other members to their network

Sitewide Features
1. Robust, full-text searching of all public content across the site plus any items the user has private access to, including within files; sitewide search must respect group permissions with private content not exposed to non-group members in any way
2. Users can upload and embed multimedia files (images, audio, video, animated gifs)
3. Spellcheck when writing content
4. Contextual help prompts

Admin Functionality
1. Robust statistical reports available to ALA ITTS staff detailing sitewide activity
2. ITTS Helpdesk should automatically be added to every new group roster as it's created (for both iMIS and non-iMIS based groups)

Permissions & User Roles
1. Customizable user roles and permissions by role and/or member type (ITTS admin, group admin, member, non-member, staff)
2. Non-members with iMIS records can participate with fewer permissions than iMIS users who are ALA members (e.g., members have robust profiles that display all ALA participations, while non-members show only basic information on their profiles)

Mobile Access
1. Uses responsive design for display on a variety of devices
2. Ability to implement mobile apps for iOS and Android

Vendor Assurances
1. All functionality on the site must comply with Web Content Accessibility Guidelines (WCAG) 2.0; if your site/services are not fully compliant with this standard, provide a timeframe in which you will implement full support
2. Provide a detailed security plan for protecting member data and confidential content
3. Proven uptime of at least 99%
4. Templates (for both web and email) and functionality should look and work the same across the most current version of Apple Safari, Google Chrome, Microsoft Internet Explorer/Project Spartan, and Mozilla Firefox

Desired Features
Your response should include a line-by-line explanation of how your solution implements or addresses each of the following desired features.

Groups and Group Collaboration
1. Group members can create group surveys
2. Users can share content with multiple groups at once
3. Users can drag and drop files to upload and move them (as long as there is also an ADA-compliant way to do these same actions)
4. Option to "follow" a group you're not a member of in order to receive email notifications of public content added to the group
5. Customizable group home page templates that can be managed by group admins
6. Group admins can create forms that submit to a database within their group
7. Users can easily share external content into a Connect group
8. Users can easily share public content on Connect out to other channels
9. Ability to automatically import external content (blogs, news feeds, etc.)
10. Group admins can enable/disable individual group tools on a group-by-group basis
11. Group-based advertising with reports, administered by group admins
12. Tasks or other project management tools for groups

Profiles
1. Badges and leaderboards based on activity

Member Engagement
1. Members can endorse other members
2. Members can go through a self-assessment quiz for elearning options
3. Ability for ALA to track leadership paths through the Association as charts, timelines, or other visual tools based on aggregate information
4. Dues-based groups include a link to our membership form to add that unit to your membership in order to gain access to the Connect group

Sitewide Features
1. Email notifications include a link to unsubscribe from future notifications in that thread

2. Mentor matching service
3. Database of volunteer opportunities that any member can post to; members can subscribe to email notifications of new opportunities that match their interests
4. Autosave while typing
5. Social login (e.g., Facebook login, Google login, etc.)
6. @ mentions of people with notifications to those people
7. Users can subscribe to email notifications from an individual node if not already receiving notifications
8. Upvoting/Ratings on content
9. Aggregation of public content across groups so that it's easily viewable by topic/tag
10. Ability for ALA ITTS staff to create forms anywhere on the site that submit to a database
11. Draft mode when creating content so that a user can start a post and come back and finish it later
12. Foreign language support
13. Possibility of replacing our Sympa mailing list software with community groups that act like mailing lists

Admin Functionality
1. Ability to log when an email notification is sent to a particular user to confirm receipt
2. A support community for your clients in which we can privately post questions to other customers using your software and start discussions where your staff also participates in the conversation

Permissions and User Roles
1. An intermediary level of sharing permissions beyond just group member (private) and anyone (public)

Integrations
1. Integration with the ALA Institutional Repository for easy archiving (DSpaceDirect)

Training & Documentation
Vendor will provide initial training for ALA staff covering basic administrative tasks for maintenance, usage, and first level support of the site. Describe your plan for training and any documentation to which both ITTS staff and group admins will have access.

Testing
Describe your plan for assuring that the system works properly before the launch, including for site visitors using assistive technologies. Include a timeline for each phase that provides a minimum of two weeks for beta testing, including for ADA-compliance.

Communication & Project Management

Identify the tool(s) to be used to communicate with ALA and manage the project. Detail the composition and skillsets of your project team and how you'll approach the project, including for ongoing support after the launch.

Warranty & Support Options

Describe any warranty provided as well as your system support plan and terms for both implementation and ongoing support.

Pricing

Provide a total annual price and any setup fees broken down by phase for all required features. Include ongoing costs (e.g., annual license fees) and pricing for technical support if extra.

Any costs for adding desired features should be broken out separately. Note that one factor we will take into consideration is whether a vendor is willing to work with us to provide features not currently available in its system, so be sure to note your level of flexibility in this regard.

Questions & Inquiries

Submit questions to Jenny Levine (jlevine@ala.org, 312-280-2461).

Proposals are due by 9:00am CDT on Tuesday, May 26, 2015. Send your response to Sherri Vanyek (svanyek@ala.org) and Jenny Levine (jlevine@ala.org).

To prevent your proposal from possibly languishing in a spam filter, leave a voicemail for Jenny Levine (312-280-2461) with the sent from email address after you have emailed your proposal. We will confirm receipt of your proposal by email when we receive it.

About Your Company

Provide information about your company's legal structure, length of time in business, principal business activities, and other relevant information we should know.

Describe your company's principals; also provide relevant background information on those persons likely to be assigned to this project.

Provide at least three references for similar projects that include iMIS integration.

If your company has been in business for less than five years, be prepared to provide ALA with financial statements for the past three years.

About 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 55,000 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, 20 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.