



DLF Website Request for Proposals

30 May 2008

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Introduction

The Digital Library Federation (DLF) relies on its website (<http://www.diglib.org>) to communicate with everyone from staff of member libraries to the public at large. The website mediates the first contact much of the world has with DLF and its mission. It serves as a communication mechanism for DLF members and working group participants. It becomes the archive and record of DLF accomplishments.

The staff of DLF recognize that the current website needs significant retooling to meet the needs of the organization. They field complaints of broken links, poor navigation, slow performance, outdated content, and unappealing design. Working groups of DLF often go to outside sites for basic workgroup services and even to share their output. Working with this consultant, the staff have developed this document to share the requirements of a new DLF website.

The requirements in this RFP envision a website with a much simpler, yet more dynamic structure. It would be a website that can distinguish between classes of users and allow them to cluster together into appropriate groups for access to specialized material. It would be a website that allows staff to manage pages more immediately during the course of fast-paced events like the DLF Forum meetings. It would be a website capable of stitching together opinions from across DLF to help everyone know more about ideas emerging across our membership. Even so, these requirements have been kept simple and straightforward, something DLF can actually accomplish in a short timeframe.

The DLF website currently includes about 25,000 files weighing in at under 1.5GB, but we estimate that it may grow at a rate of roughly 1GB per year for the next few years. We would estimate storage needs of at least 10GB, though some additional elbow room would not hurt. During the months of our twice yearly DLF Forum the site attracts about 60,000 sessions generating about 200,000 page views to transfer about 15GB per month. Whatever solution is proposed in response to this RFP should be able to cope with this order of storage and usage.

Requirements

These requirements for the new DLF Website encompass both functional and non-functional attributes of the site. In most cases these should be read as true requirements, though some items may be tagged “[desirable]” to indicate that while desired they are of slightly lower priority than other requirements. Many of these requirements were derived from a set of use cases (referenced by letters in parentheses and provided in a separate document) developed with the staff of DLF. Your response to these requirements will become part of a future contract, should you win the job, so please be very clear about any concerns you have about individual requirements.

0. Development & Support

As part of a broad and active digital library community, we care about not just the outcome, but how we get there.

- 0.1. The site shall be developed using open source technology.
- 0.2. Any development and documentation done for this site shall be made available to the whole community under a standard open source license.
- 0.3. The respondent may offer web hosting services, if available, but DLF shall be free to ask them to develop the site only and use alternative web hosting.
- 0.4. The respondent shall describe the hosting solution that will accommodate a load greater than that of the current site.
 - 0.4.1. The website shall have room for at least 30,000 files weighing in at 2GB, but estimated to grow at a rate of roughly 1GB (15,000 files) per year for the next five years.
 - 0.4.2. The website shall handle at least 75,000 sessions generating about 300,000 page views per month.
 - 0.4.3. The website shall be able to transfer at least 25GB per month.
- 0.5. The respondent shall offer ongoing technical support to DLF, although DLF is free to obtain these services from any other provider.

- 0.6. The new site shall be able to co-exist with a frozen version of the existing site to facilitate the resolution of existing references. [desirable]
- 0.7. The site shall be backed up at least daily and files from backups shall be available to DLF staff as needed.
- 0.8. The site shall be designed to resist attacks on the server, such as cross site scripting, SQL injection, and URL poisoning.

1. Content

Our site already has content of every sort, and we don't anticipate the variety getting any less over time.

- 1.1. Content of the site shall be well separated from design to facilitate editing of the content without concern for the design. (E)
 - 1.1.1. The site shall make use of industry standards such as CSS and shall be viewable with full features on all modern browsers including Firefox 2, Safari 3, and IE7.
 - 1.1.2. DLF staff shall have access to the "skin" of the site and authority to edit that skin as needed.
- 1.2. Content on the site shall have URLs that are persistent enough for embedding into other settings like del.icio.us, digg, and user blogs. (C)
- 1.3. Content shall be open to web spiders such as Google. (D,F,G)
 - 1.3.1. The site shall be able to generate site maps, page metadata, and other search engine optimizations automatically. [desirable]
- 1.4. Content of the site shall be editable from any web browser. (E)
 - 1.4.1. When editing, the site shall display date, time and user who last edited each page. (E) [desirable]
 - 1.4.2. The site will respond gracefully to multiple, simultaneous attempts to edit one item. (E) [desirable]
- 1.5. The site shall accept file uploads. (B,E,L)
- 1.6. The site shall be able to aggregate content made available via RSS. (H)
- 1.7. The site shall be able to accept comments on selected pages and documents. (B,I)
 - 1.7.1. It shall be possible to attach comments at the paragraph level to designated pages of the site. (B) [desirable]

- 1.8. It shall be possible for multiple users to jointly edit designated pages of the site as wiki pages. (B)
- 1.8.1. Wiki pages shall keep a history of changes made and be able to roll back to prior versions.
- 1.9. Users shall be able to tag each page of the site with multiple terms. (J) [desirable]
- 1.10. The site shall be able to “freeze” certain content into an archival form that no longer accepts comments or editorial changes. (J) [desirable]
- 1.11. Newsreaders shall be able to subscribe to updates of changes to the content within designated areas of the site. (A,C,E,H) [desirable]

2. Structure

The site must be readily comprehensible by the newcomer, and yet functional and direct for old hands.

- 2.1. The site shall have a clearly designated area for DLF Forum information. (A,E,F)
- 2.2. The site shall allow for the creation of designated group areas. (B,C,D,I,J)
- 2.3. The site shall include a contacts area with information about DLF. (G)
- 2.4. Each group area shall include a contacts page with information about members of that group. (C) [desirable]
- 2.5. The site shall include a public relations area with general information about the organization. (K)
- 2.6. The site shall include an opinions area to aggregate blog content from around DLF. (H) [desirable]
- 2.6.1. Aggregated blog entries shall include links back to native platforms. (H)
- 2.7. The site shall present a sidebar for navigation. (H) [desirable]
- 2.8. The site shall clearly designate archival or non-active content. (J)
- 2.9. The site shall provide a workflow for managing DLF Forum information. (E) [desirable]
- 2.9.1. Data gathered as users propose sessions shall be maintained and enhanced as sessions are accepted and presented. (E) [desirable]
- 2.9.2. Data gathered to describe forum shall be used to enhance information about individual and institutional interests. (E, K) [desirable]

3. Users

Users of the site will in some cases be browsers, but in more cases be active participants in the site, people who edit the content of the site in one way or another. The system will need ways to register and administer the roles various users play.

- 3.1. It shall be possible to register users of the DLF site. (A,B,E,I)
- 3.1.1. It shall be possible for users to register themselves on the DLF site.
- 3.1.2. It shall be possible for users to register for the DLF site with an OpenID. [desirable]
- 3.2. It shall be possible to distinguish staff from non-staff users of the site. (E,J,L)
- 3.3. It shall be possible to distinguish between member and non-member users of the site. (A,B) [desirable]
- 3.4. It shall be possible to assign each user to any number of groups on the site. (B,I)
- 3.5. Designated administrators of group areas shall have the authority to assign users to their own groups. [desirable]
- 3.6. It shall be possible to designate "super-users" with full access to all areas of the site. (J)
- 3.7. Each user shall have a profile on the site to be referenced from various contacts pages. (C,G) [desirable]

4. Security

While not overzealous about security issues, we do need good basic security of the site so that the content we provide can be relied on by our community.

- 4.1. Areas of the site with access limited to a certain set of users shall require user registration. (B,I)
- 4.2. Group areas of the site shall include at least three levels of access for their content: (B,C,D,I)
- 4.2.1. It shall be possible to make content public, for all to see; (C,D)
- 4.2.2. It shall be possible to make content members-only, so that only registered users who are members or who are assigned to the group can see it; [desirable]
- 4.2.3. It shall be possible to make content private, so that only registered users who are assigned to that group can see it. (B,I)
- 4.3. Wiki areas of the site shall include at least two levels of access: (B)

- 4.3.1. It shall be possible to make wiki pages public, so that any registered user can edit the pages.
- 4.3.2. It shall be possible to make wiki pages members-only, so that only registered users who are members or who are assigned to that group can edit the pages; [desirable]
- 4.3.3. It shall be possible to make wiki pages private, so that only registered users who are assigned to that group can edit the pages. (B,I)
- 4.4. The ability to leave comments on the site shall include at least three access levels: (B,D,I)
- 4.4.1. It shall be possible to make commentary public, for all to create and see; (D)
- 4.4.2. It shall be possible to make commentary members-only, so that only registered users who are members or who are assigned to that group can create and see it; [desirable]
- 4.4.3. It shall be possible to make commentary private, so that only registered users who are assigned to that group can create and see it. (B,I)
- 4.5. There shall be at least two classes of tags: (J) [desirable]
- 4.5.1. There shall be tags that can be entered by any user;
- 4.5.2. There shall be tags that can only be entered by DLF staff. [desirable]
- 4.5.3. DLF staff shall be able to remove any tag.

5. Other requirements

- 5.1. The site shall have the ability to present forms which generate email sent to appropriate DLF staff persons.
- 5.2. The site shall be able to identify orphan pages (pages without any inbound links). [desirable]
- 5.3. The site shall be able to identify stale links (links that point to nowhere). [desirable]
- 5.4. The site shall be responsive, most pages should load in less than two seconds and no page should require more than four seconds to load under reasonable network conditions. [desirable]
- 5.5. The site shall adhere to the web accessibility guidelines of W3.org. [desirable]
- 5.5.1. The site shall provide text alternatives for any non-text content so that it can be changed into other forms people need, such as large print, braille, speech, symbols or simpler language.

- 5.5.2. Content shall be presentable in different ways (for example, with a simpler skin) without losing information or structure.
- 5.5.3. The site shall make it easy for users to see content, including separating foreground from background.
- 5.5.4. The site shall make all functionality available from a keyboard. [desirable]
- 5.5.5. The site shall provide ways to help users with disabilities navigate, find content and determine where they are.
- 5.5.6. The site shall make text content readable and understandable (even via screen readers).
- 5.5.7. The site shall make pages appear and operate in predictable ways.
- 5.5.8. The site shall maximize compatibility with current and future user agents, including assistive technologies.

Timeline & Deliverables

As with any project that requires heavy collaboration to succeed, we have developed a timeline that will allow us to engage our participant communities as we build the site.

August 2008

- develop and sign a contract with the person or organization to acquire any software necessary and develop the web site as per this RFP
- obtain necessary server
- begin development

September 2008

- **deliver** a beta version of the site to our user community
- polish the look and feel of the site
- **deliver** draft version of administrative documentation and guidelines for site

October 2008

- incorporate changes suggested by beta period
- **deliver** a complete migration of legacy DLF content
- **deliver** final administrative documentation and guidelines for site
- **deliver** full production version of site
- hand full administrative control to DLF

We anticipate this contract would be complete by Friday, 31 October 2008.

We are willing to entertain modifications to this timeline, but request that any variations from this timeline be clearly spelled out and justified in the response to this RFP.

Guidelines for Proposals

Intent to file a proposal (a note with a contact name, email and phone number) shall be sent to Barrie Howard at the following address: bhoward@diglib.org, on or before Thursday, 26 June 2008.

There will be a conference call option made available on Monday, 30 June 2008 to allow for clarification and responses to any questions raised. Questions sent to Barrie Howard via email will be answered, with responses posted to the DLF Website wiki page (<http://eric.clst.org/DLF/RFP>), so that all respondents have the same information.

Final proposals are due to Barrie Howard, bhoward@diglib.org (or, if via snailmail, Barrie Howard, Digital Library Federation, 1755 Massachusetts Ave, NW, Suite 500, Washington, DC 20036) by Thursday, 17 July 2008. Proposals must comply with the requirements presented in this document.

The proposal shall include:

- description of the organization/company and its staff (including names/URLs of previous projects completed)
- plan for the project and method of work, including any variance from the proposed timeline
- response to the requirements, including detailed notes of concerns with individual requirements
- proposed price: a) for software development and launch into production, b) for monthly technical support, c) for monthly hosting
- description of technology to be used
- description of software from third parties to be used
- hardware and software requirements of the server where the software will be installed
- hardware and software requirements for the client using the software
- characteristics of the hosting service offered or recommended
- any additional resources the respondent offers to the project (work study student time, for instance, or usability testing)

The selection shall be communicated to all persons who sent a proposal, no later than Thursday, 31 July 2008.