



actualizestudio

To: Barrie Howard, Digital Library Federation
From: Michael Barnard and Ian Velinsky, Actualize Studio LLC

Date: July 17, 2008

About Actualize Studio:

Actualize Studio is a professional full service web and marketing firm based in the Washington DC area. We specialize in website development, graphic design, and marketing. Actualize Studio features an integrated team of consultants, creative designers, writers, developers and marketing professionals that know how to get results.

For the past ten years, we have built a reputation for creating 'magic' for our clients. From grocery chains to government contractors to local real estate agents, we produce success. We believe our skill sets, creativity, experience, and service sets us apart.

Digital Library Federation Website

Requirements

To show that the ActCMS platform will satisfy DLF functional requirements, our comments are posted in black. Replies that answer multiple requirements are listed under those requirements grouped.

Development and Support

- 0.1. The site shall be developed using open source technology.
Actualize Studio's ActCMS is a customized platform based on the WordPress open source CMS system.
- 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.
All documentation and source code shall be made available. All.
- 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.

Based on analytics and performance statistics of various similarly hosted sites, Actualize Studio believes 2 dedicated servers – 1 web (application) server and 1 database server – will be more than sufficient to handle the DLF traffic and storage requirements for the foreseeable future. We recommend, and offer, a co-located facility to provide bandwidth and support. This exact setup is currently implemented for one of our clients and performs well with over 700 concurrent sessions (at peak traffic periods).

- 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]
ActCMS has editable permalinks.
- 0.7. The site shall be backed up at least daily and files from backups shall be available to DLF staff as needed.
DLF will have complete access to any and all files involved with the application at any time.
- 0.8. The site shall be designed to resist attacks on the server, such as cross site scripting, SQL injection, and URL poisoning.
A majority of the customizations Actualize Studio has built on top of the WordPress platform involve security (addressing these specific issues), user rights, and performance.

Content

- 1.1. Content of the site shall be well separated from design to facilitate editing of the content without concern for the design.
ActCMS is template driven, so content is completely independent of design
- 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.
Browser compliance is dependent on the template, but there are hundreds of available templates for ActCMS to build off that are already compliant with most existing browsers.
- 1.1.2. DLF staff shall have access to the “skin” of the site and authority to edit that skin as needed.
All files, whether stylesheet or actual .php files, can be edited from within the ActCMS system.
- 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.
Permalinks can be custom coded in whatever format DLF chooses, and this format can be edited at anytime and the original links will still be valid.
- 1.3. Content shall be open to web spiders such as Google.
ActCMS is built with SEO best practices in mind (i.e. separating out.css and .js files) and has numerous plugins available for advanced SEO functionality.
- 1.3.1. The site shall be able to generate site maps, page metadata, and other search engine optimizations automatically.
Plugins are available for this functionality.
- 1.4. Content of the site shall be editable from any web browser.
ActCMS works in all modern browsers.
- 1.4.1. When editing, the site shall display date, time and user who last edited each page.
Post and page metadata display is completely configurable for any page or post.
- 1.4.2. The site will respond gracefully to multiple, simultaneous attempts to edit one item.
ActCMS transactions are handled at the MySQL record level.
- 1.5. The site shall accept file uploads.
Plugins provide this functionality.
- 1.6. The site shall be able to aggregate content made available via RSS.
Plugins provide this functionality.
- 1.7. The site shall be able to accept comments on selected pages and documents.
Comments are completely configurable for any page / post.
- 1.7.1. It shall be possible to attach comments at the paragraph level to designated pages of the site.
Plugins provide this functionality.

- 1.8. It shall be possible for multiple users to jointly edit designated pages of the site as wiki pages.
ActCMS has complete Wiki functionality.
- 1.8.1. Wiki pages shall keep a history of changes made and be able to roll back to prior versions.
ActCMS pages, posts, and Wiki have versioning.
- 1.9. Users shall be able to tag each page of the site with multiple terms.
ActCMS provides tagging functionality.
- 1.10. The site shall be able to “freeze” certain content into an archival form that no longer accepts comments or editorial changes.
Pages and post comments and edit functionality are configurable.
- 1.11. Newsreaders shall be able to subscribe to updates of changes to the content within designated areas of the site.
Plugins provide this functionality.
 - NOTE
ActCMS, built on the open source WordPress platform, has hundreds – if not thousands – of freely available plugins available to not only handle all the functional requirements listed in the DLF RFP, but also has *multiple options* for each of these functional requirements and more plugins are being created by the open source community every day!

Structure

- 2.1. The site shall have a clearly designated area for DLF Forum information.
- 2.2. The site shall allow for the creation of designated group areas.
- 2.3. The site shall include a contacts area with information about DLF.
- 2.4. Each group area shall include a contacts page with information about members of that group.
- 2.5. The site shall include a public relations area with general information about the organization.
The site navigational structure is completely configurable from the admin section.
- 2.6. The site shall include an opinions area to aggregate blog content from around DLF.
- 2.6.1. Aggregated blog entries shall include links back to native platforms.
- 2.7. The site shall present a sidebar for navigation.
Content and navigation is dynamically built based on whatever structure is chosen. Since ActCMS is data driven, any data is available throughout the site and all code is accessible via the admin tools.
- 2.8. The site shall clearly designate archival or non-active content.
- 2.9. The site shall provide a workflow for managing DLF Forum information.
- 2.9.1. Data gathered as users propose sessions shall be maintained and enhanced as sessions are accepted and presented.
- 2.9.2. Data gathered to describe forum shall be used to enhance information about individual and institutional interests.
Actualize Studio will work with DLF to ensure these requirements are satisfactorily met.

Users

- 3.1. It shall be possible to register users of the DLF site.
Admins can edit users and power users.
- 3.1.1. It shall be possible for users to register themselves on the DLF site.
ActCMS has a registration wizard process including email verification and lost username / password retrieval.
- 3.1.2. It shall be possible for users to register for the DLF site with an OpenID.
OpenID plugins are available.
- 3.2. It shall be possible to distinguish staff from non-staff users of the site.
There are 3 primary roles, Administrators (complete access to all functionality), Content Editors (generally users that can publish content to the site – their editing range is configurable), and Contributors – i.e.

public users that register and wish to comment and have access to other members-only sections and documents.

- 3.3. It shall be possible to distinguish between member and non-member users of the site.
All users are defined by their roles, and transactions are marked with the UserID of who preformed the transaction.
- 3.4. It shall be possible to assign each user to any number of groups on the site.
The terminology we use is slightly different, but user permissions are completely configurable.
- 3.5. Designated administrators of group areas shall have the authority to assign users to their own groups.
This functionality is available in the administration section for Admins and Content Editors.
- 3.6. It shall be possible to designate “super-users” with full access to all areas of the site.
We explained our general security roles in 3.2, but will work with DLF to make sure that their exact security roles and functional requirements are met.
- 3.7. Each user shall have a profile on the site to be referenced from various contacts pages.
Each user has a complete profile record in the database, and can even have avatars associated with their profiles.

Security

- 4.1. Areas of the site with access limited to a certain set of users shall require user registration.
- 4.2. Group areas of the site shall include at least three levels of access for their content:
 - 4.2.1. It shall be possible to make content public, for all to see;
 - 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;
 - 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.
- 4.3. Wiki areas of the site shall include at least two levels of access:
 - 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;
 - 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.
- 4.4. The ability to leave comments on the site shall include at least three access levels:
 - 4.4.1. It shall be possible to make commentary public, for all to create and see;
 - 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;
 - 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.
- 4.5. There shall be at least two classes of tags:
 - 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.
 - 4.5.3. DLF staff shall be able to remove any tag.

* NOTE

All of the proposed security functional requirements listed we believe currently exist in ActCMS, but again, Actualize Studio will work with DLF to ensure that these requirements are met to their satisfaction.

Other Requirements

- 5.1. The site shall have the ability to present forms which generate email sent to appropriate DLF staff persons.
Forms can be added to any page or post, and all fields are completely customizable.
- 5.2. The site shall be able to identify orphan pages (pages without any inbound links).
- 5.3. The site shall be able to identify stale links (links that point to nowhere).
We provide a 3rd party tool to check for stale and orphan links.

- 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.
We have optimized the MySQL database for maximum performance.
- 5.5. The site shall adhere to the web accessibility guidelines of W3.org.
Because the site is template driven, and there are hundreds (thousands) of css templates available (and growing) to use as a foundation, developing an accessible template for DLF should not be difficult.
 - 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.
Plugins are available for Section 508 compliance.
 - 5.5.2. Content shall be presentable in different ways (for example, with a simpler skin) without losing information or structure.
Changing templates can be done on the fly in the admin section, however, if customizations have been made to a specific template than that functionality of course will be lost. Another import factor to consider is that some functionality is available via plugins, and some templates require specific plugins in order to work. So although changing a template will have no direct effect on the content itself, it definitely can affect non-content related functionality built into the templates.
 - 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.
 - 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.
Actualize Studio will work with DLF to design the perfect template.

Website Maintenance and Continual Service

Actualize Studio (AS) offers a web maintenance plan for all custom-built websites. Work that can be done on this plan includes all website updates, changes, and or additions to the site. No in-house networking is included. The cost is \$75 per hour and there is a 4-hour \$300 minimum. Hours do not expire over time.

Timeline / Staffing for the DLF project

Actualize Studio (AS) understands the time sensitive nature of this project as outlined in the RFP. We are prepared to offer 1 senior graphic designer, 1 content management configuration expert, 1 senior level developer and server administrator, 1 developer, and 1 project manager to this project to accommodate the aggressive timeline proposed.

AS believes that, if DLF staff provides the time and materials necessary, meeting the DLF proposed timeline is obtainable. The only area of concern outside of typical project development delays that AS would like to address going into the DLF CMS project regards handling the existing DLF site content.

AS would like to propose a review of the existing content to determine a course of action, i.e. categorizing and prioritizing this content and developing a method of cataloging and navigation to this content in the new system.

Senior Staff for the DLF project

John Christopher Hoover
VP of Creative Services

John has worked with some of the largest corporations in the D.C. area, including Booz Allen Hamilton, Adobe, Computer Associates, HP, Juniper Networks, the Department of Homeland Security, and many others.

To see a scope of the design and marketing projects John has overseen with Actualize Studio, visit our Portfolio section on the Actualize Studio website at <http://www.actualizestudio.com/portfolio.act>.

Some of John's recent achievements:

2006 - Gold MarCom Creative 2006 Award, in the "Ads/Advertising Campaign" category, for a series of three ads created for Robbins-Gioia, LLC.

2006 - Finalist in the Stevie ABA 2006 Competition for "Best Mixed Media Campaign."

The lead-generation and awareness campaign used online, print, and outdoor advertising, as well as special events, to help increase awareness of and demand for Juniper Networks' J-Series routers within government agencies.

2004 - Stevie Award Finalist, for a campaign completed for Juniper Networks' federal services division. The Juniper Networks DC Metro Awareness Campaign was recognized in the Best Outdoor Ad Campaign category.

**Michael Barnard
VP of IT**

Michael has been developing and architecting systems for the past 14 years. He has worked on some of the most heavily trafficked sites on the web (lifeminders.com, USA Today) to implementing ERP systems for a local grocery chain (Balducci's).

To see a scope of the development projects Michael has overseen with Actualize Studio, visit our Portfolio section on the Actualize Studio website at <http://www.actualizestudio.com/portfolio.act>.

Estimated Cost

Task	Additional Details	Estimated Cost *
ActCMS Content Management System	* as specified in above proposal	\$31,000.00
2 Dedicated Servers w/ backup, configured and placed at our co-lo for hosting (optional)		\$3,000.00
Co-location Hosting	\$150 per month per server	
Site Maintenance	\$75 per hour/ 4 hour blocks	
		Total _____

Approval of Proposal / Commencement of Work:

Signature:	Date:
Title:	

Signature above signifies agreement to the Terms and Conditions. Work will commence once the proposal is approved and the agreed deposit is received. Pricing is for listed services only and does not include external costs (photos/images, courier charges, scope changes, etc.) that may arise.

Actualize Studio Terms and Conditions:

Confidentiality: This proposal and all associated cost estimates or creative strategies are considered confidential by Actualize Studio and are not to be shared with parties other than employees of DLF (hereafter referred to as Client) Actualize Studio who have an express need to know, without prior written consent from Actualize Studio.

Payment Terms: A deposit of 50% of the total estimated amount and the full cost of the servers is due upon Client's approval of this proposal. The deposit must be received before work can start on project. The final balance will be invoiced following the completion of the project. Invoices are due upon receipt. Invoices not paid within 30 days will be charged a late fee of 6% per month on the outstanding balance.

Payment for Services Rendered: Client will be advised in advance if (because of program changes) non-estimated costs are reasonably anticipated. The absence of a written statement of additional costs shall not relieve Client of its responsibility to pay for all work ordered by Client on a written or verbal basis from Actualize Studio.

Deliveries and Materials: Courier charges, shipping costs, overnight delivery charges and charges for materials supplied (e.g., photographs, illustrations, fonts, film, negatives or slides) will be billed by Actualize Studio as additional charges unless specifically included in proposal.

Promotion: Client authorizes that Actualize Studio may include Client's name, samples of work created for Client and results of program on Actualize Studio's Web site, portfolio and in any promotional materials.

Cancellation Clause: Client agrees to pay a Cancellation Fee of 50% of the Estimated Cost if this proposal is cancelled more than five business days after signing. In the event of cancellation, Client agrees that Actualize Studio shall be released from any further responsibility for the completion of work. Client agrees to compensate Actualize Studio for all work completed at the time of cancellation, if the amount owed for such work exceeds the Cancellation Fee. In addition, Client agrees to pay to Actualize Studio all costs incurred prior to cancellation.

Attorney's Fees and Costs of Collection: In the event of default by the Client under this agreement, Client agrees to pay all costs of collection, including reasonable attorney's fees, whether or not a lawsuit is filed.

Company Property, Copyrights and Trademarks: All computer equipment and software utilized by Actualize Studio in conjunction with Client's project shall remain the sole and exclusive property of Actualize Studio.

Disclaimer: Actualize Studio is not responsible for occurrences outside of its sole and exclusive control or acts of God.

Initials / Date _____/_____