



Request for Proposal (RFP) Redesign, Development, and Hosting of the CCS Website - Vendor Questions

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General

Question: General question: Can some offshore resources be utilized to reduce costs, or do all resource need to be US based?

Question: What are your preferences regarding staffing, onshore, nearshore, offshore resources? Does it matter to you?

Question: Would you be open to a non-US based vendor completing this work? Do you have a preference towards domestic vendors?

CCS prefers a domestic vendor for this project. The successful vendor may use offshore personnel as appropriate for the project provided that 1, the personnel are directly under the control and supervision of the domestic vendor and 2. the domestic vendor takes full responsibility for the security of any data shared with the offshore personnel.

Question: Do any of the websites being created need to be in multiple languages, English, Spanish, other?

No

Question: What is the objective of the website?

To create a single hub where CCS member libraries may find group meeting information, instructional materials, procedures and policies as well as governance documentation.

Question: What is making the business revamp/redesign the existing website?

The current CCS websites are dated. Information is contained in several websites rather than one unified location.

Question: Who are the potential target audiences of this website?

Audiences served by the website include:

- Member library staff looking for CCS governance documentation as well as instructional materials to support their use of the integrated library system
- Libraries operating in the Chicagoland area looking to join CCS

Question: Is there anything in particular driving the timelines listed in the RFP? Is there any flexibility in your timeline, should additional time be required? Depending on the amount of content to be migrated, along with other deliverables, the 4 months listed seems to be an aggressive timeline.

The anticipated website launch date is June 1, 2021. This is an estimated launch date. CCS understands work may take longer given the content migration and other factors.

Question: Remote Work: Can we assume that all work may be conducted remotely, without a need for in-person meetings? Or is there a requirement for in-person?

All work may be conducted remotely. Meetings may be held over video conferencing software.

Question: Who will be responsible for website content?

CCS is the content creator and will be responsible for the website content.

Question: Could you please list out the details of the Approval Workflows?

Kathleen Weiss is the direct contact for all project concerns. She will coordinate internally as needed to gather feedback.

Analytics

Question: Section 3.10 TECHNOLOGY/PLATFORM REQUIREMENTS lists hosting requirements. To accurately price a hosting solution, could you tell us how many visitors and page views your site receives each day?

Question: Please provide usage statistics for the current sites, and the projected/desired usage level for the new site?

Question: Can you provide the number of page views per month, currently?

Question: How much traffic does the site(s) get in terms of monthly visits/users?

In the last year CCS websites have had:

- 35,000 page views
- 21,000 sessions
- 13,000 unique visitors

We do not anticipate this traffic will increase.

Question: What is the average bandwidth usage per month?

150MB-200MB per month

Question: Can you provide current storage requirements for both database and files?

450 GB

Question: Does the existing system have Google analytics embedded?

The CCS website (www.ccslib.org) and training portal (www.training.ccslib.org) have Google Analytics installed. Our other digital properties do not.

Question: We integrate most of our sites with google analytics and tag manager. Are there other systems or software that you are currently using?

Wix provides a native analytics tool that we use to monitor search terms and traffic. Google Analytics is present on the CCS Website (www.ccslib.org) and Training Portal (www.training.ccslib.org).

Question: Is analytics as a service (e.g. Google Analytics) acceptable/desired, or is a hosted analytics system preferred?

Google Analytics is an acceptable solution.

Budget

Question: Please provide a general budget range for this project? Providing this will help potential vendors in suggesting appropriate solutions.

Question: What value does CCS place on this project?

Question: Not mentioned in the RFP/no page reference: Is there a budget range for this project that you are able to share with us?

Question: What is the budget?

Question: Budget: Could you share a budget or range of acceptable costs for the project? (e.g. under \$50k, \$50k-100k, \$100-250k, \$250k+). Knowing your budget or at least a range of potential costs helps determine if we are a good fit for the project, how we should approach it, and a sense of your expectations as well.

Question: What is the budget allocated to this initiative?

Question: Can you kindly specify the budget allocated either for this project, or the budget that was invested in the previous system?

Question: In section 4.2 EVALUATION CRITERIA on page 15 of the RFP, it is noted that Pricing is worth 20% of the proposal. Would you be able to disclose a budget range or budget cap for this project?

Question: Do you have a target budget or budget range?

Question: Given all the features requested this could be a rather involved project. Is there a budget or range we can use to sanity test or assumptions?

As a small, member-funded organization, CCS focuses on providing a high value for our stakeholders. CCS originally budgeted \$20,000 for this project. As work began developing the RFP and we developed a better understanding of the scope of the project, we increased the budget to \$30,000. Proposals outside of the budgeted amount will be considered, but preference will be given to vendors who can help us find appropriate solutions within our budget. CCS reserves the right to alter the scope of the budget to meet our budgetary needs prior to awarding a contract. Vendors may choose to propose a base project with optional, add-on services or features that CCS can consider.

Cataloger's Wiki

Question: The RFP indicated that you wished to combine all digital properties into a single environment, which implied the other sites were going away. But the request for integration with the Wiki implies that it will continue. Can you elaborate? In our experience, Wiki's tend to work best as standalone software, and most attempts at integrating a Wiki directly within a CMS framework are not ideal. Are you planning on keeping the existing wiki and/or open to moving to a different wiki platform that is hosted on its own subdomain?

CCS is open to not migrating the Wiki if this can provide a significant cost savings. We welcome migrating the Wiki to its own subdomain that shares a common theme with the CMS. CCS would like the Wiki and CCS website to feel as though they are part of the same organization.

Question: Wikis are not always a good fit with more traditional content management systems. Must the new website include the wiki, or can we move it to a hosted MediaWiki or other wiki software?

CCS is open to not migrating the Wiki if this can provide a significant cost savings. We welcome migrating the Wiki to its own subdomain that shares a common theme with the CMS. MediaWiki or another Wiki software would be fine so long as theming make it look as though they are part of the same organization.

The current Cataloger's Wiki is already housed in MediaWiki.

Question: Would theming the wiki to match the main site and providing some level of integration be an acceptable alternative to including in the site?

CCS welcomes the idea of theming the wiki to match the main site with some level of integration

Question: If we are moving the wiki content to the new website what is the purpose of integrating the site with the no longer used wiki?

CCS is open to not migrating the Wiki if this can provide a significant cost savings. We welcome migrating the Wiki to its own subdomain that shares a common theme with the CMS. CCS would like the Wiki and CCS website to feel as though they are part of the same organization.

CMS Platform

Question: Is there any organizational preference for or against an open-source solution built on something like Drupal or WordPress?

Question: Have you chosen WordPress, Drupal, as well as other CMSs?

Question: In regards to section 2.3 OUR CURRENT ENVIRONMENT on page 4 you mention that the current site is on Joomla with Wix and HTML being used on the Learning Portal and Training Question: Portal. Do you have a preference towards remaining on an Open-source platform? Would you consider moving to Drupal for the consolidated site?

Question: Can we propose a new CMS or should we be using the existing CMS?

Question: Is there a (CMS) platform preference?

Question: General question: Do you have a preferred CMS platform?

Question: [Page 7, Section 3.4] Are you open to paid software for CMS, user management, grammar-checking, etc.? Or, do you rather seek open-source options?

We are open to any CMS platform that meets our needs and budget.

General question: Is your current platform an option and why are you looking to replace?

CCS does not want to use Wix for its website. We are not opposed to using Joomla for the redesign.

CMS Features – General

Question: The RFP lists a number of functional requirements for the new CMS. Is there any flexibility to these, should one or more prove too time consuming or costly to do within the current budget or timeframe?

CCS is interested in which, if any, requirements would be considered too onerous and welcomes alternative solutions to those outlined in the RFP given explanation.

Question: Will Image Library functionality include video handling? If so, where are the videos currently stored?

The Image Library does not need to include video handling. Video content is currently stored on YouTube. However, the CMS need to allow for embedding of video content.

Question: For job posting, Does the website need to handle the job application (job application form, resume, job application dashboard, etc.)? Or is the job application handled by a 3rd party system?

The job posting is simply a page where we can post a job description. We also want to be able to post the job description as a PDF. Users do not need to be able to fill out an online application or submit forms. CCS requests job application documents be emailed directly to HR.

Question: Would broken link checking via an external system be acceptable?

Yes

Question: Does the search need to index the contents pdf / Doc files?

Yes, if possible. If it is a big challenge, we would like to know about it. Not being able to find content within PDFs has been an issue.

Question: Does the proposed website need tools to host/stream Audio and Video?

No. However, we do want to be able to embed video and audio that is hosted elsewhere (e.g. YouTube).

Question: Is creating a forum, blog or an interactive form for the users anticipated to be part of the proposed website?

No.

Question: Will the site include the ability for visitors to sign up for email alerts / bulletins / etc.?

Yes, visitors need to be able to sign up for our newsletter.

Question: CMS, Improving: The CMS we typically recommend is open source, and we configure and customize it as needed to best serve the project. Where does a process for “improving the software”, or “reviewing new technologies” fit within a redesign project? Are you referring to an ongoing process, post-launch (ongoing support and site improvement)? Or simply at the onset of the redesign?

CCS wants to ensure the vendor is knowledgeable about the proposed technology and software solutions. We also want to ensure that the most up to date technology is used in our website redesign.

We are simply asking the chosen vendor to use modern software and technology when proposing solutions in their response.

Question: System Requirements, Spell Check: There are free browser plugins that offer this ability, including when editing content in a CMS. Does it need to be a part of the CMS specifically?

A suggested browser plug-in that solves for spell-check is an acceptable solution.

Question: HTML Code: Our sites allow editors to view and edit HTML code of the content they are allowed to edit (e.g. a block of text on a page). Is that the hope or expectation? Access to an entire page's HTML for editing (e.g. headers, footers, menus, etc.) is not something we offer, nor any CMS that we know of. That code is dynamically generated, and is not directly editable.

The ability to allow editors to view and edit HTML code of the content they are allowed to edit is sufficient.

Question: Ref 3.7 System Features - Form Creator: Could you elaborate on the last three items? Method by which form data is stored in a database and can be exported in a usable format from the CMS.

CCS wants the ability to create online forms whose content may be exported as a CSV file. We sometimes need to create a poll or request information from our 28 member libraries. It would be helpful to be able to create a native form rather than relying on tools like Google Forms or Microsoft Forms. Linking out to Google Form or Microsoft Forms takes users out of our website.

Question: Does this mean the ability to include results data in other content, say an article, or is it referencing a different functionality?

CCS wants the ability to embed the created form in an article. We do need to be able to include the results data.

Question: Capability to merge forms with other applications of the CMS. Does this mean the ability to include a form or forms on a page with other content? Please elaborate.

CCS wants the ability to embed multiple forms in an article. We also want the ability to duplicate an existing form.

Regarding the ability to customize forms for other applications of the CMS and tie directly into those tools. What type of tool are you referring to? Please elaborate.

We have a form that members complete to register for our newsletter. We would like to be able to embed this in a webpage.

[CMS Features – Document Library, Document Archive, and Document Storage](#)

Question: Document archive and storage: Your description of these components seem to imply a document management system, which is typically different from a CMS. In a typical CMS you can publish and unpublish content (or mark it as “archived”) to remove it from public display. Is this

what you have in mind or are you looking for a true document management system to store and organize internal files?

You have described exactly what we have in mind. CCS wants to be able to publish and unpublish content (or mark it as “archived”) to remove it from public display. The CMS should also be able to house media such as images, PDFs, or word documents that may be embedded in a page.

Question: [Page 7, Section 3.4] Would the versioning of the website and the documents be independent of each other? Please elaborate.

The document library is simply meant to be a repository for PDFs, Word documents, images, and media uploaded to our website.

These are separate from the versioning of website.

Both the document library content and website ought to be able to “roll back” to a previous version.

Question: Please elaborate on Document Library requirements. Will documents in the library be CMS generated content or files uploaded into the system or both? Will uploaded documents need to be edited from within the system? What metadata requirements are anticipated?

Documents in the document library is not a combination of CMS generated content but may also include Word documents or PDFs we opt to embed on a page. CMS generated content ought to be able to edit from within the document library. Word documents and PDFs should be able to be replaced with a new version. CCS ought to be able to “tag” content in the document library so it may be pulled up give certain search terms.

Question: How are the Document Archive and Document Storage feature requirements different from the Document Library discussed on page 7 in section 3.4? How are they expected to interact?

Document Storage is repository to house all content that will be used or embedded on the website such as PDFs, Word documents, images that is not generated by the CMS. The Document Archive is where documents that have been deleted. The Document Library contains drafts and published content created using the CMS.

CCS recognizes that a Document Storage, Document Archive, and Document Library may be a single entity in a CMS. That is acceptable so long as the desired functionality is present.

CMS Features – Printing

Question: System Requirements, Word Doc: The RFP lists “Conversion of Microsoft Word Documents to HTML” ... Is this something offered by an existing CMS? We can offer the ability to paste text from Word into a WYSIWYG, but nothing (currently known) to automatically convert a Word file into functional HTML within a CMS.

There are two separate problems we are trying to solve for. First, content creation has been challenging using Wix. We selected it due to the drag and drop interface, which allowed us to position screenshots neatly in procedural documents. However, as our staff and number of content creators grew, the limit of one editor in the site (not page, site) at a time became very challenging. As a result, content creators moved to creating documents in Word and only logging in to Wix to copy and paste when editing was

available. We are open to a WYSIWYG editor that is user friendly and can support concurrent editors in the site.

Additionally, a significant portion of our users prefer to refer to printed procedures and have requested PDF downloads. Our experience with platform-delivered “printer-friendly views” has not been ideal. Content often has too much white space, unintended and unhelpful page breaks, or other formatting issues. Updating both a web page and a separate PDF is cumbersome.

We welcome solutions that will help us present both web-view appropriate and print-view appropriate formats without duplicating efforts.

Question: Will print-friendly stylesheets be considered in lieu of a PDF conversion tool?

A significant portion of our users prefer to refer to printed procedures and have requested PDF downloads. Our experience with platform-delivered “printer-friendly views” has not been ideal. Content often has too much white space, unintended and unhelpful page breaks, or other formatting issues. Updating both a web page and a separate PDF is cumbersome.

We welcome solutions that will help us present both web-view appropriate and print-view appropriate formats without duplicating efforts.

Content Migration

Question: Is any content migration going to be part of the Scope?

Question: Migration can add significant costs to any project. Does your staff have any interest or availability in this process, or plans to rework any existing content on any or all of the existing sites? We are predicting that much of the content migration will be a manual process, so having your staff participate or manage some of these migrations may provide significant savings (time and budget).

All existing content needs to be migrated to the new CMS. CCS is open to assisting with content migration as a cost savings measure.

CCS is actively performing a content inventory before work begins to limit the number of pages that will need to migrate to the new CMS. CCS is interested in having staff participate in the content migration as a cost saving measure.

In your response to this RFP, please itemize content migration for the following scenarios:

- Vendor completes the content migration
- CCS participates in the content migration
- CCS completes the content migration

Question: [Page 3, Section 2.1] Do you plan on taking all of the content of the 4 websites to the redesigned portal, or would you be cleaning up and purging some of the existing content?

CCS would clean up and purge nonessential existing content.

Question: Approximately how many documents does the current site have?

Question: Approximately how much content (html pages and PDF or other docs) need to be migrated from Question: each of the 4 websites?

Question: The RFP requires migration of content from multiple sources to the new site (CCS Website, Learning Portal, Training Portal, Wiki). How many pages and files does each site contain (approximately)? Note that migrating from database-driven sites can often be automated with scripts, but migration from static sites such as the Training Portal is done manually (e.g. cut and paste).

Question: Can you provide us the anticipated no. of pages on the website? Again, this will help us with the estimations.

Question: Could you expand on section 3.8 CONTENT MIGRATION on page 12 in regard to the amount of content? How many page URLs and how many documents do you anticipate will require migration to the new CMS platform?

Question: Can you provide an estimate of the amount of content (number of web pages vs number and size of files) to be migrated?

There are 889 URLs and 580 PDFs. Below is the breakdown for each of our websites:

- Learning Portal (www.learning.ccslib.org): 701 HTML pages. Please note that 519 of those pages are indexed versions of our Mail Chimp newsletter. 80 PDFs
- CCS Website (www.ccslib.org): 90 HTML pages, 500 PDFs
- Training Portal (www.training.ccslib.org): 1 HTML page
- Cataloger's Wiki (www.ccslib.org/Catalogers/index.php/Main_Page): 97 HTML pages

Hidden content on the Learning Portal (www.learning.ccslib.org) is primarily made up of the following pages:

- Mail Chimp newsletters: are archived pages of our newsletter
- Policies and Procedures are "how to" articles that explain how to use our integrated library system.

All files take up 450 GB of space.

Hidden content on the CCS website (www.ccslib.org) is primarily made of the following pages:

- Advisory Group documentation: contains agendas and minutes for these groups
- Technical Group documentation: contains agendas and minutes for these groups
- Member Directory: a list of all CCS members
- CCS News Archive: are archived pages of our newsletter

Please notify CCS if you would like guest credentials for our CCS Website (www.ccslib.org) and CCS Learning Portal (www.learning.ccslib.org). We realize much of the content is behind a log-in and welcome prospective vendors to view our full websites.

Question: [Page 3, Section 2.3] Content in the existing pages has many links and few of them are not working (redirected to wrong sites or produce 404 error). Would you provide the corrections with content, when needed? Also, what kind of access to the website data we will get?

CCS will troubleshoot incorrect links and those that produce a 404 error.

Question: Do you have technical staff versed in your current system available to help with migration related work?

CCS has nine full-time staff members. Six staff members are well-versed in our current system and available to help with migration related work.

In your response to this RFP, please itemize content migration for the following scenarios:

- Vendor completes the content migration
- CCS participates in the content migration
- CCS completes the content migration

Question: Overall, most of the links / pages are in PDF format. Do you want to retain it in the same way or need to be converted as webpage format? If yes, need a list of pages / links that need to be developed as webpage format.

PDFs do not need to be converted. Existing PDFs will need to be searchable.

For the Learning Portal (www.learning.ccslib.org) most PDF links are webpages reformatted to be printable (i.e. we have procedures in website format and linked as a PDF). If the actual redesigned web site is printer-friendly, we do not need to convert the PDFs.

On the CCS website (www.ccslib.org) most PDFs/attachments are minutes, agendas, and policies. These items can stay in PDF format, but should be searchable.

Question: Who will be providing the content for the website?

CCS will provide the content.

Question: Who will be providing images and graphics assets for the website?

CCS

Current Environment

Question: Will you be able to setup and provide Staging and Production Environment?

No. We do not have a Staging and Production environment, but we welcome assistance with setting this up.

Question: How many environments (DEV/QA/UAT/PROD) does CCS have?

We do not have those designated environments, but we welcome assistance with setting this up.

Question: Can you please brief up on how main website will be linked up to the other 3 websites? Relationship between them.

This is a summary of our website environment.

The CCS website (www.ccslib.org) contains information about our organization, governance documents, and an events calendar. The Learning Portal(www.learning.ccslib.org) was launched in 2017 when CCS migrated to a new integrated library system. The Learning Portal has grown to encompass all our training documentation and procedures. The Training Portal (www.training.ccslib.org) was launched in 2020 as a container for our online courses. The CCS website, Learning Portal, and Training Portal ought to be fully integrated.

The Cataloger's Wiki lists (http://www.ccslib.org/Catalogers/index.php/Main_Page) current local cataloging practice and recent decisions of the Catalog and Metadata Management (CAMM) Technical Group. This resource was established in November 2008, with a major revision in early 2017. This Wiki should be styled in the same way as the combined resource, but it is separate entity.

Question: Are the training exercises linked via [training.ccslib.org](http://www.training.ccslib.org) part of the migration? If yes, what development platform or tools are they built on?

No. CCS would link out to these training exercises.

Question: Who supports the current sites?

Question: Current Site: Did your team build the current sites or was it done by an outside vendor? Do you have technical knowledge of how they were built? Is there a current vendor you work with who is also bidding on the new website?

For current websites:

The CCS Website (www.ccslib.org) was built by an outside vendor with a reconfiguration in 2016. The Learning Portal (www.learning.ccslib.org) was built and is maintained by CCS staff using Wix. The Training Portal (www.training.ccslib.org) was built and maintained by CCS using simple HTML. The courses contained in the Training Portal were built using Rise 360. CCS will not migrate these to the new CMS and will link out to the courses. The Cataloger's Wiki (www.ccslib.org/Catalogers/index.php/Main_Page) was built and is maintained by CCS staff using MediaWiki.

There is limited technical knowledge of how each page was built as each service is housed in a prebuilt CMS or service except for the Training Portal.

Basecamp Web Solutions provides ongoing support in Joomla for www.ccslib.org. This vendor may bid on our website redesign project.

Question: Online catalog: Library Info. Requirements: Quick Training: Online training Courses; Is this going to remain on an external system?

The online catalog and online training courses will remain hosted by CCS.

Question: Wonder desk; Is this going to remain on an external system?

Wonder Desk is no longer in use. We use Fresh Desk for our ticketing system. Fresh Desk will remain on an external system.

Question: Listservs: Is this going to remain on an external system?

Online training courses will remain hosted by CCS.

Current CMS Challenges and Desired Changes

Question: Since the current sites are built on top of Joomla, Wix, or simple HTML. What are the challenges you are facing by using Joomla or Wix as the CMS?

Question: Site Complexity: In your experience are there certain areas or sections of the site that you perceive as complex or otherwise difficult to work with? Are there any known problem areas on the current site?

The Learning Portal (www.learning.ccslib.org) uses Wix and does not have a proper WYSIWYG editor. Instead, there are drag and drop boxes that house content. Positioning all of this in the proper place is cumbersome. Wix takes forever before it allows you to type in a text box or do anything at all. Then it takes even longer before it can save and publish a page. Making one edit that would normally take a couple of minutes takes 15 or more minutes. Organizing menus in Wix is difficult. We must manually pan down a long list of "parent" and "child" pages to rearrange our header menu.

The CCS website (www.ccslib.org) uses Joomla and has a document library that is very difficult to navigate. When editing the website, you may upload Word document, PDFs, images, and draft content in the CMS as an "article". The relationship between where all of these display on the front-end of our website is very confusing. Joomla makes it difficult to insert images in the correct part of an article and preserve your intended layout. The organization of the website makes our technical and advisory groups difficult to follow. There are meeting dates, agendas, minutes, and lists of group members. All of this is housed in separate parts of the website.

For both Wix and Joomla, we wind up relying heavily on PDFs of our written training procedures because our users want a printer-friendly version. Our current CMSs claim to be printer-friendly but there is often too much white space on the print-out.

Search functionality for Wix and Joomla is a huge concern. PDFs and Word documents are not indexed and therefore may not be searched.

[Page 4, Section 2.4] Usability testing that was done earlier, the website says that all the recommendations have already been incorporated. Is that true? If yes, what are the major concerns around usability of the current website? Other than putting all 4 different websites into one cohesive design, what are some major concerns?

We have not implemented the recommendations from the user testing for the CCS Website Redesign Project.

Can you please describe the qualities of your ideal partner? Can you share an example of a situation where you feel your vendor missed the mark in terms of communication and partnership? Can you share an example partner story where your partner knocked it out of the park for you?

An ideal partner is responsive, mindful of our budget, and helps our team understand how and why things work the way they do. This partner should propose thoughtful solutions for CCS' stated needs and budget. We recognize you are experts at what you do and welcome your ideas.

Vendors who miss the mark are usually those who cannot deal with our inquisitive staff. Most of our staff have worked as librarians before coming to CCS and love to understand how things work. We ask a

lot of questions. An example of this would include a recent product demo. The presentation was very general and included a lot of information that is publicly available. When we asked technical questions, the presenter did not have any examples or explanations available. While we do not expect a presenter to know everything, we do expect that they are knowledgeable about their product and come prepared.

The vendors we have enjoyed working with most are those that become partners. Our integrated library system provider is a great example of this. When we have run into technical problems, we speak with our site manager and she works with us to resolve concerns. When we have needed to develop a custom workflow using their software for a member library, this vendor provides ideas. Working together is a truly collaborative effort and our site manager is willing to slow down and explain the nitty gritty details of a process. Having a dedicated point person within the organization makes communication straightforward and pleasant.

Question: Could we get more insight into what you like — and dislike — about the three sites you reference, Consortium of Academic and Research Libraries of Illinois, HR Source, and Triangle Research Library Network?

Consortium of Academic and Research Libraries of Illinois: <https://www.carli.illinois.edu/>

We like the megamenu under “Products and Services” in the header. This makes it very easy to place multiple links in the menu without overwhelming users. We have many procedures and instructional guides and organizing these in megamenu would help curate the content without an endless drop down.



The search bar embedded in the header is a “must have” as our users need the ability to quickly pull up the desired procedure or instructional guide using search terms.



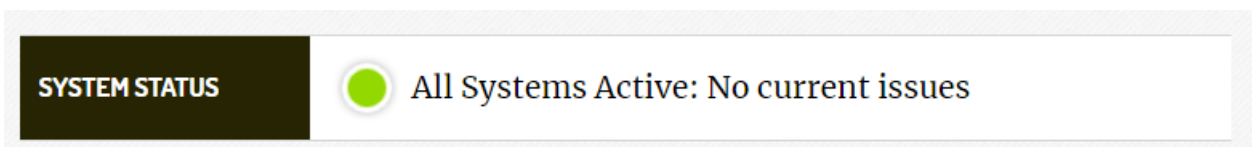
The links in the upper right corner to commonly used services is key. Our email lists, member directory, and commonly used links get lost in our current header structure.



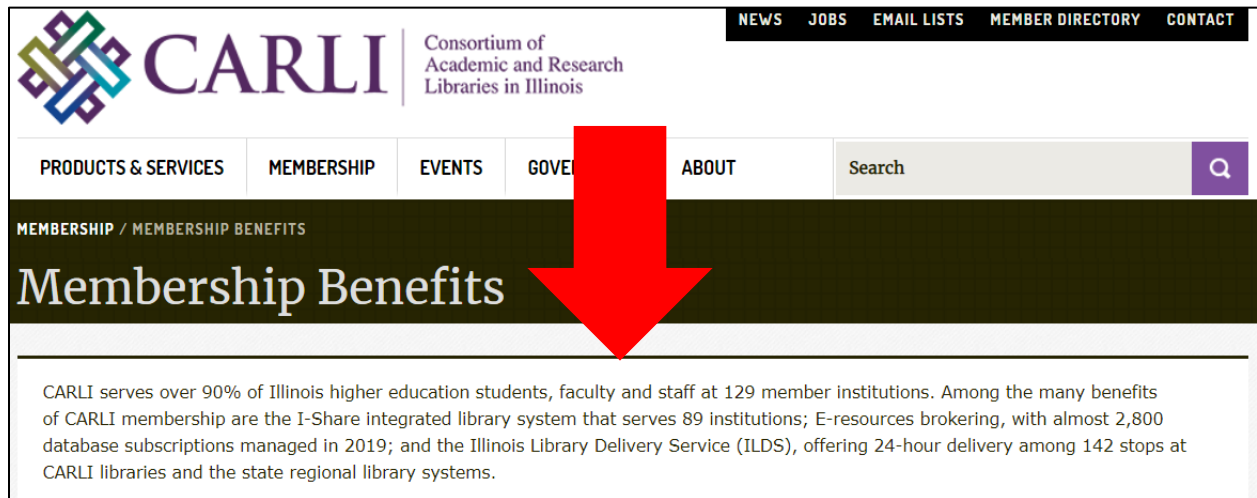
When you visit the Consortium of Academic and Research Libraries of Illinois webpage you can quickly determine the purpose of their organization. CCS' current website do not clearly communicate the purpose or role of the organization.



The System Status Message lets users know if the library catalog is down for any reason. We currently email our users when this happens, but we like the idea of letting them know on our website.



The member benefits page spells out how members benefit from joining CARLI. We like that members can see the value of membership on a single page.



CARLI Consortium of Academic and Research Libraries in Illinois

NEWS JOBS EMAIL LISTS MEMBER DIRECTORY CONTACT

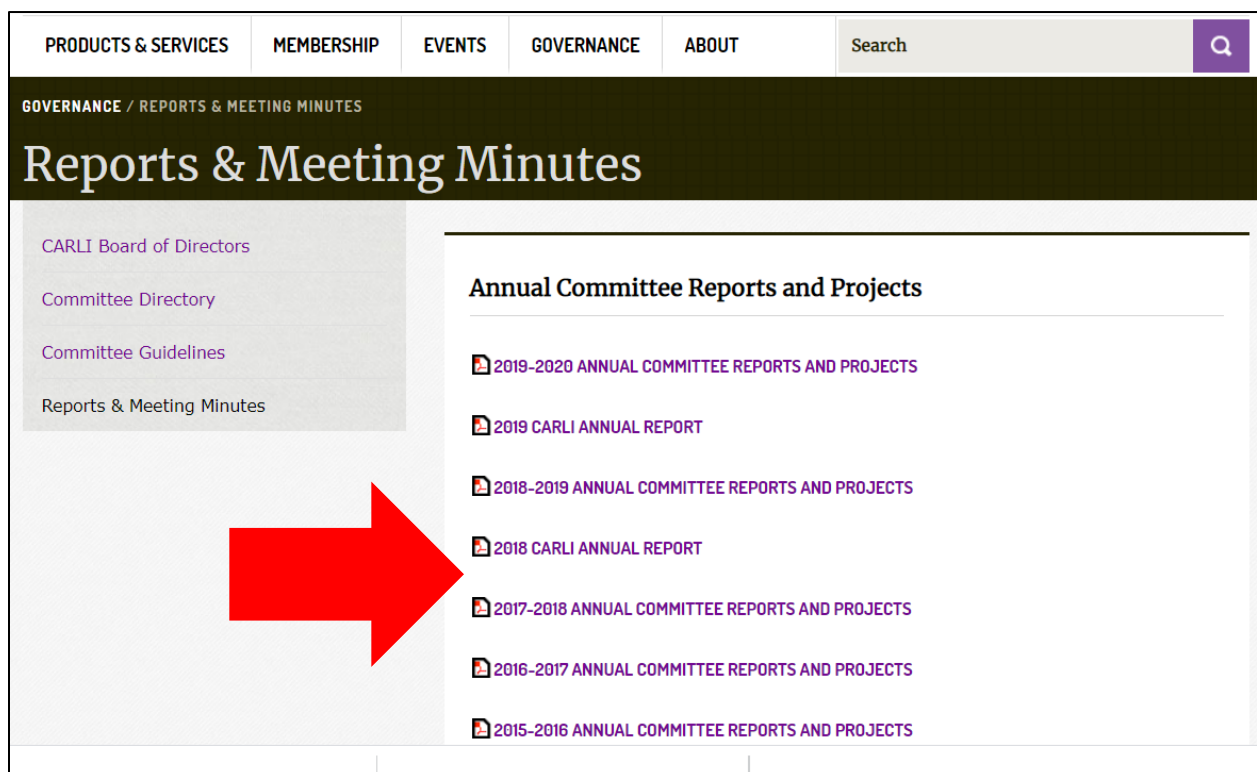
PRODUCTS & SERVICES MEMBERSHIP EVENTS GOVERNANCE ABOUT Search

MEMBERSHIP / MEMBERSHIP BENEFITS

Membership Benefits

CARLI serves over 90% of Illinois higher education students, faculty and staff at 129 member institutions. Among the many benefits of CARLI membership are the I-Share integrated library system that serves 89 institutions; E-resources brokering, with almost 2,800 database subscriptions managed in 2019; and the Illinois Library Delivery Service (ILDS), offering 24-hour delivery among 142 stops at CARLI libraries and the state regional library systems.

Minutes and reports are all contained in a single page rather than organized on individual group pages. On the CCS website (www.ccslib.org) our group pages each contain separate minutes, agenda, and documentation. A centralized page for this type of documentation make it easier to find.



PRODUCTS & SERVICES MEMBERSHIP EVENTS GOVERNANCE ABOUT Search

GOVERNANCE / REPORTS & MEETING MINUTES

Reports & Meeting Minutes

CARLI Board of Directors
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HR Source: <https://www.hrsource.org/maimis/>

HR Source is lot like CCS in that we are a member driven organization. On the HR Source webpage, they distinguish training opportunities from member resources. It is very clear that training

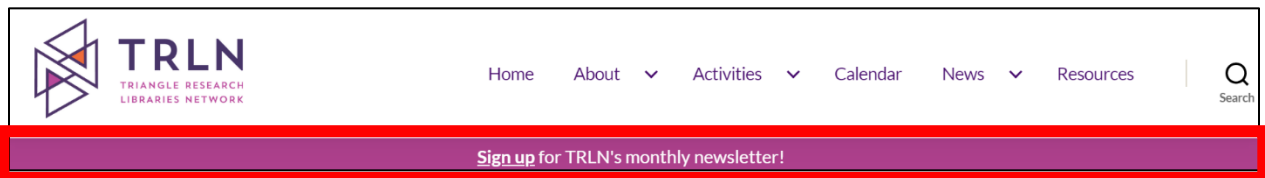
opportunities include the option to take a course or learn while member resources include documentation/procedures. The CCS Learning Portal (www.learning.ccslib.org) struggles to make the distinction between eLearning courses and procedures/documentation.



Triangle Research Library Network: <https://trln.org/>

CCS like the look and feel and of the TRLN website. It is not cluttered. The menu is easy to navigate and understand.

The banner is customizable and may easily be updated. CCS likes how the banner may be used as a call to action to sign up for a newsletter or used to announce something like an emergency closure. A flexible tool like this banner would give CCS an option to quickly update the website for visitors.



We like how important documents are easy to locate. Important documentation lives under the “About” dropdown and contains all the things prospective member would need to know.



Hosting

Question: [Page 13, Section 3.10] Are you open to hosting on the cloud? If not, it is a common practice to store documents and images on the cloud for faster access. Would you allow for that?

Yes, we are open to cloud-based hosting.

Question: Do we consider that we (Vendor) need to provide hosting solution?

Yes. The setup and costs, of a web hosting solution need to be incorporated into the project, but you may recommend use a third-party hosting platform.

Question: Does your current hosting vendor provide DRP capability?

We are hosting our own website. We do backups and run a virtual environment for it.

Question: General question: Is the current DRP strategy in an active-active mode or active-passive mode?

It is in Active-Passive mode.

Question: In order to properly quote hosting, can you provide the following statistics for each current site:

In the last year CCS websites have had:

- 35,000 page views
- 21,000 sessions
- 13,000 unique visitors

Question: What is your team looking for in a managed hosting solution? Any specific requirements?

The setup and costs, of a web hosting solution need to be incorporated into the project, but you may recommend use a third-party hosting platform.

L2 Integration and Sign In Credentials

Question: Could you please provide the API document for L2

Question: Can we confirm that you will provide the access to library learning credentials for us to integrate?

Question: [Page 9, Section 3.5] Post contract, would we get access to the L2 database?

When a selected vendor starts development, we will set them up as an API consumer on L2, provide a unique client token and secret needed to use the API. API documentation is also available here: www.ccslib.org/open-rfps

Question: What Single Sign On protocol does L2 support?

The examples throughout the API document utilize Client URL (CURL). CURL is an open-source command line tool and library that is used to retrieve data. Throughout this document examples will be shown using CURL via the command line or CURL via Pre-Hypertext Processor (PHP). The L2 API is not limited to using CURL, you can use any method or development library that you wish, provided it can make a network request to a Hyper Text Transfer Protocol Secure (HTTPS) URL.

Question: Where are the current user accounts stored? Are they all in L2?

Currently, our users (member library staff) have shared log-on credentials for our Training Portal (www.learning.ccslib.org) on Wix and CCS website (www.ccslib.org) on Joomla.

As part of the website redesign library staff will sign in with their L2 credentials which gives them read-only access to the site. CCS staff will need a CMS log-in to edit the website.

Question: [Page 9, Section 3.5] A related question is regarding sign-in management. Once the 4 websites are merged into one, do you plan on SSO with roles and privileges? Does the signing into the websites currently governed entirely by L2?

There will be two log-in methods:

- L2 – Our users, library staff sign in with their L2 credentials which gives them read-only access to the site.
- CMS Log-In – CCS staff will use a CMS log-in to edit the website.

We are open to a single sign on solution where editor/content creator permissions are separately flagged as needed, but it is not necessary.

Question: Are there any required interfaces from either internal or external systems (Includes Payment Gateway)?

Integration with L2 is necessary. See the linked L2 API documentation: <http://ccslib.org/open-rfps>

Is all the Content/Information public or does the website require a registration and Sign-in functionality for certain type of users or viewers to access specific information?

Sign-in functionality through a shared user log-in is currently required for read-only access of policies and procedures, group documentation, and contact lists. In the redesign, the shared log in will be replaced with the L2 log in.

Question: What is the number of concurrent users for the current CCS website, Learning Portal, Training Portal, and Cataloger's Wiki?

Question: How many authenticated users are expected to use the system at any given time? How many authenticated users in total are anticipated?

The max number of concurrent users (CCS staff) editing and working on content is nine. The max number of concurrent users with read-only access to the website could be as high as 750.

Question: Will L2 authentication be used primarily for content editor or admin authentication? Are there other types of users that will use this authentication method, and if so - what types of content or functionality does authentication grant them?

L2 will provide read-only access to our redesigned website.

We anticipate that a CMS log in will still be needed to grant CCS staff editing privileges for the website.

Question: How many administrative level roles are anticipated? For instance, Site Manager, Content Editor, Content Publisher, etc.

CCS anticipates the following administrative level roles as you have outlined:

- Site Manager: assigns permissions
- Content Editor and Publisher: writes and publishes

Our team is made up of nine staff members, so we do not need much differentiation between administrative levels.

The only situation where a user may need permission to suggest an edit would be for our Cataloger's Wiki. A small set of our users, library staff make suggestions for changes but those are ultimately approved by a content editor and publisher.

Mail Chimp Newsletter

Question: Can we confirm that you will provide the access to MailChimp credentials for us to integrate?

Yes

Question: MailChimp will generate a web-access version of each newsletter, which editors could embed via an iFrame to a page or section of the new site that contains an archived list of emails sent. Would that be sufficient?

This solution is sufficient.

Question: [Page 10, Section 3.7] Are there existing templates for the newsletters or would we have to design them? Also, are the newsletters interactive or made of static content?

There is an existing template for our newsletter. You would not have to design the template. Newsletter content is static. You can view an example of our newsletter here:
<https://mailchi.mp/72bee51ef043/ccs-news-1255927?e=8e0435a5ef>

Miscellaneous

Question: Does the existing website have any integrations with other websites or applications?

Question: Is there any custom applications or functionalities built in the current site?

Question: What 3rd-party integrations are included?

No. We link out external tools but they are not integrated into our websites.

Question: [Page 13, Section 3.10] Do you have any zones of preference for disaster recovery?

No. We currently use AWS for disaster recovery.

Question: Is PMP Certification required for Project Manager assigned for the task?

No

Question: Regarding the System Uptime Guarantee on page 13, would you consider changing the uptime requirement of 99.99% to the industry standard of 99.95%?

Yes

Question: How many payment modules are there?

None

Question: Will this project be a single or multiple site plan?

Single Site plan

Question: Does your team require a Service Level Agreement for uptime?

The hosting platform should have a guaranteed uptime of 99.99% and be backed by a Service Level Agreement (SLA).

Question: Please confirm that one design theme will carry across the entire site. If we need sub-themes of any type, please specify.

One design theme will carry across the entire site.

Stakeholders

Question: Your Team: Who will be involved in the project from your team? Who would be the project lead?

Question: Beyond your single point of contact, can you please elaborate on the makeup of the CCS core team, and how many additional stakeholders you have planned for within Discovery?

Kathleen Weiss is the project lead.

Staff involved in the project include:

- Kathleen Weiss, User Experience Specialist
- Rebecca Malinowski, Executive Director
- Marcin Urbanski, IT Manager
- Debra Wischmeyer, Member Services Manager

Support and Training

Question: Is training the end users part of the Scope? If yes, how many users are to be trained? And, can the training be conducted from remote location through online?

The vendor is expected to train nine CCS staff in the use the website. This training may be conducted remotely.

Question: The RFP states the vendor “must commit to regular maintenance and updating of the CMS.” This is done through post-launch support programs, and we can include details about this in our proposal. But can we assume that this is a separate and ongoing cost, apart from the initial redesign?

This would be a separate and ongoing cost. Vendors also have the opportunity to bid for ongoing support maintenance if interested. Please enter this as a separate line item in the Ongoing Costs table in the RFP (5.1.11, page 19).

Question: The language around live support, support materials and online training videos seems to imply a paid, SaaS-based CMS versus an open-source CMS such as Drupal or WordPress. Or that the vendor and the CMS are one in the same. Is that your intention? For an open-source CMS, while we provide ongoing support, we also encourage clients to use the entire available ecosystem for support and learning (e.g. other sites, the CMS site, 3rd party services, free training videos, books, etc.). Is this an option for CCS?

We are very receptive to an open-source CMS. CCS asks that the vendor provide remote training on use of the CMS for our staff. We are also interested in learning about the existing job aides, video tutorials, or instructional guides that your firm has created for the CMS.

CCS understands that training may be available online for an open-source CMS, but we want to be sure the chosen vendor’s prepared training can sufficiently outline how to use the CMS.

Question: [Page 13, Section 3.11] How long would we need to provide the live (email, phone) support?

Live support via phone or tickets should be provided through project completion and the warranty period of the website.

Vendors also have the opportunity to bid for ongoing support maintenance if interested. Please enter this as a separate line item in the Ongoing Costs table in the RFP (5.1.11, page 19).

Question: System Requirements, Live Support: Is this a request for emergency support from a CMS vendor or a feature of the CMS? Or simply a request to have access to emergency support as needed from the vendor? Could this be fulfilled by the web host?

This is simply a request to have access to emergency support as needed from the vendor. This could be fulfilled by the web host.

Question: [Page 13, Section 3.9] Regarding in-person and remote training, what would the period for providing such training? Would it be as required or conducted regularly for a given time period?

The vendor would be required to train CCS staff on the use of the CMS. This would be conducted once or in a series if needed. CCS does not anticipate training will be given regularly.

Question: What is your current support utilization? How many hours per month are you using to maintain the current properties?

CCS has nine full-time staff members that each spends four – six hours per month maintaining our current properties. This includes writing content, entering content into the website, managing the information architectures, and troubleshooting. Much of this has to do with the convoluted back end Joomla and the slowness of Wix.

Question: Is there a certain level of support needed for this site? (i.e. 24/7 chat, phone, tickets)

Live support via phone or tickets should be provided through project completion and the warranty period of the website.

Vendors also have the opportunity to bid for ongoing support maintenance if interested. Please enter this as a separate line item in the Ongoing Costs table in the RFP (5.1.11, page 19).

Question: How do you envision the relationship with the developer post-launch? Do you need a maintenance contract to keep sites patched and secure?

Vendors have the opportunity to bid for ongoing support maintenance if interested. Please enter this as a separate line item in the Ongoing Costs table in the RFP (5.1.11, page 19).

Usability

Question: Will the offeror consider a virtual Discovery phase (beyond the survey mentioned on later on p 10) as part of this engagement to help validate assumptions and drill down on requirements to support planning and development?

CCS is interested in the virtual Discovery phase. Please outline the cost of the service as a separate line item when preparing your RFP response.

Question: What level of WCAG compliance are you targeting? (A, AA, or AAA)

AA

Question: Are you currently using any tools (i.e. SiteImprove, etc) to maintain accessibility on your digital properties?

No.

Question: Do you need us to conduct an extensive discovery process that includes extensive research into user persona development - or a more streamlined discovery based on the web team's input and best practices?

CCS is looking for a more streamlined discovery based on the web team's input and best practices.

Question: [Page 5, Section 3.2] As per the RFP, we would engage UI/UX designer(s) to create a new attractive website design. We wanted to know if you have any design templates already in mind as a guideline?

We do not have a design template already created. CCS has conducted some user testing and has proposed ideas for the website's navigation menu. You can read those reports at:
<https://www.learning.ccslib.org/usability-testing>

Question: Who will be responsible for User Acceptance Testing?

CCS

Question: Page 6, Section 3.2: Is User Usability Testing in scope of this project? I believe CCS already conducted the usability testing already, where the test result and findings are located in <https://www.learning.ccslib.org/usability-testing>

We have already identified many of the existing usability concerns with our own websites and want these resolved with the redesign. We expect that the vendor will involve CCS staff in design recommendations and a wireframe version of the proposed new website that will be used to develop homepage and interior page design concepts. This may include usability testing with CCS staff.

Question: Your user research effort is commendable. How do you envision the chosen agency augmenting your internal team's efforts?

CCS expects that the chosen agency use our research to inform their design, but we welcome your discovery phase as well as recommendations.