



2020 Cary Library Website Redesign Request for Quote

Library Overview

Cary Memorial Library (Cary Library) is the public library located in the historic town of Lexington, MA (population 33,792) in a community with high expectations of education and life-long learning of which the Library plays an integral part.

Celebrating its 150th anniversary last year, Cary Library circulated over a million items, making it one of the busiest libraries in the state.

With hundreds of programs being offered each year, and half a million visitors coming through our doors, our website is just as busy serving over 300,000 sessions (over half a million pageviews) within the past year.

Website Redesign Project

Cary Library looks to partner with a vendor for website redesign and development services using a content management system (CMS). Our current website is running on Drupal 7, is 8+ years old, and is no longer meeting the expectations of the patrons regarding functionality, ease-of-use, and intuitiveness. Our current website is non-accessible in many features. Cary Library intends to rework and redesign the entire public-facing website with an eye on usability, accessibility, responsiveness, and ease of updating.

The scope of this project includes the calendaring and room reservation software as an alternate to this RFQ. While an integrated solution for these systems is preferred, the Library will entertain quotes for the calendar, room and museum pass reservation components separate from the website redesign project. Our goal is to provide the best customer experience possible, and these components are a key piece of the library's online services.

A mobile-first design approach is paramount. Goals also include more control and ability for staff administrators to adjust the look and feel as well as content, and the ability to create new templates. This RFQ includes maintenance and updating. The Library has recently redesigned the logo and branding and looks forward to applying the same aesthetic to our redesigned website.

Key Stakeholders

- Library patrons, supporters, and general public
- Library staff
- Friends and Foundation members
- Community Groups and partner organizations

Major Goals

We are looking for our new website to include:

- Clean, modern design.
- Mobile-first framework.
- Following WCAG 2.1 AA-standards.
- Versatile calendaring display for both staff and public for ease of use.
- Robust museum pass and room booking functionality.
- Enhanced access to digital collections.
- Greater ease in featuring collections, titles, and resources.
- Improved back-end software support.
- Improved interface to create interactive book lists that support digital reader's advisory.
- Mechanism to prominently feature library news and social media on homepage.

Project Scope

The scope of the project includes the migration of current content and the following additional individual and sitewide features and functionality.

Individual Features

News Page

- Provisions for a multiple blog format for news, book reviews, and emergency updates including archiving and tagging.
- Ability to sign up for e-newsletters and view past issues.
- Ability to easily upload a PDF of a news story and create a link to it on the news page
- Ability to add links to library-related stories on other media outlets, such as wickedlocal.com.
- News page should allow preview of individual items and link to full item.
- Ability for public users to share News items to social media outlets, email, or print with a simple click.
- Ability for staff to post news items directly to social media outlets, choosing which components to include and a way to link back to News page. (incorporate social media dashboard to news page for staff to use)

Readers' Advisory Online Interface

- Provide an easy to use form for the submission of patron reviews and reviews submitted by staff
 - all reviews would be collected in a database with tags with the ability to mark (checkboxes or blank field) for staff to annotate where/when individual reviews were used (e.g. social media, newsletter, etc.)
 - reviews written by the public would require staff review/approval before posting to live site, staff reviews would be able to publish easily to the live site
 - any reviews posted to the live site should be searchable by tag, keyword, title, as well as browsable by tag, date, reviewer/user, age (children, teen, adult)
- Promotional displays and curated lists of library materials (books, DVDs, CDs, etc.) including item images, descriptions and/or reviews, tags/subject heading, reviewer's name, date, and link to item in library catalog.
- Ability to output data in format for main pages (e.g. feature a box with a Children's review on the Children's landing page or subpage).
- Ability to print list in readable format.
- Ability to link/embed YouTube or audio files from Library programming.

Online Resources

- Presentation and searchability of electronic subscriptions, databases, and other paid resources.
- Ease of updating resource links and descriptions by staff.
- Ability to have embedded links to staff-created multimedia tutorials for online resources.
- Ability for staff to easily identify an individual resource to highlight on the Online Resources page (for example, a new database subscription or a new YouTube/video tutorial).

Sitewide Features

Accessibility

- Follow WCAG 2.1 AA-standard guidelines to enable all users an equivalent experience to access the same content.
- Accessible to all web visitors including those using:
 - screen readers
 - high contrast
 - images-off browsing
 - keyboard-only navigation
- Ability to apply proper text formatting including headers, lists, form fields, and requiring alt text for images.
- Accessible to all web visitors including those whose primary language isn't English by ensuring that all text is available to Google Translate (or similar), that translated text flows correctly at all screen sizes, and that multi-byte characters and right to left text are correctly displayed.

Configurability

The following items should be configurable by the Library administrators, or by the vendor for no charge:

- All front-end and background colors, fonts, logos, headers and footers.
- Administrator email address for status messages.
- Templates for automatic emails/texts to users, including format, colors, fonts, logos, headers and footers, and optional ticket area.
- Allowed image formats and size limits.
- Allowed document formats and size limits.
- Staff will need the ability to add dates closed (holidays, snow) that will automatically be displayed on a public-facing calendar.

Content Editor

- Provide a list of available CSS styles to ensure consistent website branding.
- Ability to schedule dates for content, and/or blocks of content, to be published and unpublished.
- Simple, straightforward WYSIWYG editor for staff to include:
 - Spell-checking of content.
 - Accurate preview of page content as it is being edited.
 - Means of displaying accurate preview of content before saving.
 - Access to commonly-used HTML elements including:
 - Headings.
 - Ordered and unordered lists.
 - Aligned images with padding.
 - Horizontal rules.
 - Bold and italic text.
 - Image alt tags.
- Ability to easily embed Google maps, videos, forms, and other rich content using the WYSIWYG editor.
- Ability to publish or unpublish for drafting purposes.
- Ability to compare and revert versions.
- Ability to stage a draft page for staff approval before publishing (e.g. leave the current page version published while a new version is created to show staff.)
- Ability to create user-friendly, shortened URLs.

Image Library

- Image repository for staff with the ability to create folders and search functionality.
- Ability to upload photos easily in a web browser, and to embed photos in program descriptions (see Calendar/Room Reservations).
- Resizing options for reducing multiple versions of the same image.
- Alt text required when uploading.
- Mobile-first, responsive display.

Integration

- Ability to easily postposting of data and images from catalog, such as Encore and Syndetics cover images.
- Cross-posting of content from social media accounts and website content including:
 - Constant Contact (newsletter content)
 - Facebook
 - Instagram
 - Twitter

Search box

- Prominent display of search box for accessing all site content, catalog searches, and other resources.
- Ability to limit search to particular segments or collections, including event calendar (See Alternate Components).
- Keyword searching, natural language, and predictive text functionality.
- Clear, relevant results with 404 alternatives and relevance ranking.
- Advanced search functions.
- Search results should be filtered by type of asset or collection.

Site Administration

- Ability to create multiple accounts with various levels of permissions available for administrators and editors.
- Ability of templating certain sections for consistency and branding.
- Flexible content organization and navigation allowing staff to easily restructure pages or link from multiple places.
- Ability to add emergency messaging to the main page.
- Printer-friendly pages

Forms

- Configurability of form layout, field types, fields and which fields are required and/or validated for:
 - Form for users' feedback, requests, and suggestions.
 - Form for users to contact the library in general.
 - Form for users to contact a librarian to ask specific questions.
 - Form for reviews (both staff and public)
 - Forms for room reservations (see Alternate Components)
 - Form for groups to request permission to make room reservations.
 - Form for groups to make room reservations.
 - Form for staff to make room reservations.
 - Form for customers to register for an event.
- Secure https forms that maintain users' privacy specifically protecting registration emails and phone numbers.
- Output results in an easy-to-use format.
- Utilize an accessible method of reducing spam.
- Visual cues for required fields, inline error notification, and submit success.

- Ability to include accessibility information such as field names and labels.
- Ability to send submitted information to spreadsheet.
- Ability to send staff email notification of new submission.
- Ability for user to receive confirmation of form submitted.
- Ability to set an expiration date for each form. This date would allow for submitted entries to be automatically and regularly purged from the database for privacy.

Reports

- Staff user log and revision information.
- Metrics on broken links, unpublished and unlinked pages, redirects, 404s, and other errors.
- Statistics on uptime and response time with notifications of issues.
- Setup of Google Analytics site-wide.
- Ability to run and print reports on use of individual rooms, program registration and attendance. (See Alternate Components)
- Ability to create customized reports as needed with full access to all data collected.

Backups and Versioning

- Content must be versioned so that changed content can be rolled back to previous versions.
- Website as a whole must also be backed up daily so that it can be completely recreated if necessary.
- Provide daily cloud-based backups with journaling, such that system failures do not result in more than one hour's lost transactions.
 - Provide ability to undo deletions of events or groups.
 - Ability to see comparative revisions to events including user ID and history.

Throughput and Response Time

- Front-end users should experience no more than 5-second response times to load new calendar page, event detail page, or to process event registration or waitlist signup.
- Back-end users should experience no more than a 5-second delay before their transaction is completed.

Security

- Enforce password standards.
- Monitor for potential hacks.
- Updates and upgrades.
- SSL connection and certificate.
- Maintain security of room users and program registrants.
- Notification of potential site downtime or performance issues.

Hosting

We expect the vendor to manage and provide hosting, with the following requirements:

- Must provide a Service Level Agreement (SLA) with at least 99.99% uptime, and provide us with the historical uptime percentage of the application, including full communication to client.
 - Customer support must be available by phone, including off-hours support for critical problems.
 - Calendar must at least have events cached locally such that calendar can be viewed on the Library website with all viewing functionality intact when cloud host cannot be reached. (See Alternate Components)
 - All transactions which cannot complete due to network or hosted application failure must provide understandable messages to end-users that indicate a temporary problem, as well as informing Library personnel of application issues. (See Alternate Components)
 - Must provide a test environment for testing major updates.
- Backups and versions must also be cloud-based.

Design/Appearance

Design

- Navigation has to be clear, uncluttered, intuitive, and accessible.
- Layout has to be clean with attention to ample whitespace.
- Grids must have breakpoints for reflow of content on various devices.
- Text should be sufficiently large and clear with the ability to be resized without overlap.
- Breathing room around images and graphical elements must be preserved.
- Responsive, adaptive design should not degrade depending on screen size:
 - Logical use of space on large monitors.
 - No crowding on small screens.
 - Image resizing based on percentage of display viewport.
 - Element rearrangement as needed for prominent display of the most important elements.

Typography

- Utilize minimum font size for clarity, readability, and legibility.
- Use variable fonts for proper scaling and fluid typography.
- Choose header and body fonts that pair well together.
- Use global base font size and then relative font units to set font sizes for other elements.
- Color and contrast of text-to-background and text-to-link must follow WCAG 2.1 AA-standard accessibility guidelines.
- Keep CSS logical and allow staff administrator access to stylesheets.
- Establish a limited range of font sizes, styles, and families.

Alternate Components

Meeting Room Management and Calendaring

Cary Library currently holds about 1,500 events per year (approx. 125 meetings per month) in five meeting room spaces, allowing many local groups and organizations to reserve meeting rooms for their own meetings and events. Therefore, two main sections of the website need to work seamlessly and in conjunction with one another – meeting room management and calendaring.

Room Reservation

The Room Reservation component must address the needs of staff, including program schedulers, office manager, and custodians, and is essentially the back-end or internal face of the public event calendar. It must include the following:

- Must work on most common platforms and browsers including desktop and mobile devices.
- Ability to view online and print a list of daily room reservations with setup information and notes.
- Ability to include, on a room-by-room basis, a descriptive list of room setups that can be requested.
- Ability to include setup time in room reservations that request certain setups. This setup time should not be shown in the public event calendar.
- Configurability options for:
 - Event category groups and individual categories.
 - Background colors for calendar entries for specific categories.
 - Room information, including setups and capacities.
 - Character limit for event details.
- Ability for allowed users to see room availability by some graphical representation, such as a calendar with available blocks, so that it is easy to find the needed amount of time without looking at each day and/or room on a separate page.
 - Ability to filter display to show *only* room availability for times and days Library is open.
 - Ability to select room and time from this room availability representation, such as by clicking on blocks.
- Ability to add new locations and to specify a one-time-use custom location (e.g. for events held in the parking lot or farmer's market).
- Ability to allow staff and permitted outside groups to easily create recurring reservations, including:
 - Selecting one or more days of the week or month.
 - Selecting days on the nth week of the month (e.g. every third Thursday).
 - Ending after a number of sessions or ending on a specific date.

- When cancelling individual dates, the remaining recurring dates remain unchanged and continue to be linked together.
- Show pick lists of some kind with multi-select categories, which will be set up by the Library. One category will denote age level (e.g. adult, teen, child). One may be for type of activity (e.g. craft, lecture, movie). These will be used as filters for calendar view. Require at least one selection be made in some categories.
- Allow Library staff to mark a room unavailable for specific dates and times, or for recurring times, without this information showing as an event on the public calendar, although it should show on the calendar used to make room reservations.
- Allow staff to select a blocked time, and put in a request for that time. Send an email to the person who originally blocked the time, asking them to give up the time to the requestor, and if the time is given up, email the requestor and reserve the time.

Outside Group Room Requests

- Ability for outside organizations to fill out a form containing library-specified fields in order to request the ability to reserve meeting rooms.
- Ability to allow or deny groups' reservation capability, set up secure accounts for allowed groups, and to disable reservation capabilities from previously-allowed groups.
- Ability to create more than one permission level of outside groups, with different capabilities:
 - Define group as “outside group” or “partner”. These definitions should be connected to rules/parameters for how many meetings per month and how far in advance a group can reserve each meeting room.
 - Limits the number of reservations a group can place in a specific time period (e.g. 2 per month in large meeting room for partners or 1 per month for “outside group”).
- Ability for users to log in, reserve and cancel with notification.
- Ability to require groups to register before being allowed to request room reservations.
- Set outside group reservations age level category to “outside group” or equivalent.
- Ability to include, on a room-by-room basis, a descriptive list of room setups that can be requested.
- Ability to require certain fields (eg email, room setup selection, contact information, even description, event title, etc.)
- Ability for allowed users to see room availability by some graphical representation, such as a calendar with available blocks, so that it is easy to find the needed amount of time without looking at each day and/or room on a separate page.
 - Ability to filter display to show *only* room availability for times and days Library is open.
 - Ability to select room and time from this room availability representation, such as by clicking on blocks.
 - Ability to automatically add a specified amount of time before/after room use (for room setup or break down and cleaning).

Event Detail Creation

- Ability to create HTML-formatted full event information, including the ability to add images that can be uploaded or linked from Syndetics (book covers), attach documents, and links to registration and waitlist as required. This is what public users should then see from the calendar view.
- Allow entry of character-limited event information and images.
- Allow events to require registration, and to set limits on the number of registrants. Allow optional waitlist and set number of slots.
- **Staff Only:** Allow confirmation and reminders of room reservations to be sent to as emails and/or texts, with templates and default text, and allow text to be modified per event.
- Allow events to require tickets:
 - Sent as part of the confirmation email
 - Printed or shown at the Library on a mobile device
 - Optionally include barcodes and/or numbered tickets.
 - Manage ticket reissuing in the event a registrant cancels.
- Allow entry of specific additional registration fields, such as number of children attending, any allergies.
- Ability to send cancellation notice via email/text to some or all groups if event(s) must be cancelled or Library closed.

Event Registrations

Event Registration Form

- Provide for entry of standard fields such as name, phone, email, and ability to make some fields required and check format of fields such as email address.
 - Clear tips and prompts to help users enter information, and to find and correct fields with missing or inaccurate information.
- Ability to customize form on event by event basis to allow for:
 - Registration of groups vs. individuals
 - Custom questions in a pre-event survey
- Ability to embed forms within event detail when created.
- Send automated email confirmation of registration.
 - Ability to customize confirmation messages and reply-to email address.

Event Registration Management

- Provide templated and customizable HTML-formatted email system to communicate with registrants for the following reasons or circumstances, both before and after a program occurs:
 - Include event details including printed or device-displayable tickets and virtual meeting details.
 - Allow links to web forms and websites.

- Ability to embed images.
- Ability to customize email reply-to address by event or message.
- Provide link to cancel registration if necessary.
- Automatically send program reminder email including add-to-calendar and cancellation link.
- Ability to email ALL registrants for programs within a specific time period of library closing (e.g. such as snow emergency or early closure).
- Ability to send automatic reminder via text.
- Ability for staff to see record of communications sent to event registrants.
- Ability for staff to manually cancel a registration.
- Ability to track registrants who do not attend programs and manually block registration for periods of time.

Public Event Calendar

Implement an application for event calendar, event details, and registration with the following details. This section outlines our requirements for the public view of the events calendar and the public registration process. Mobile-first design is very important for calendar function, but without losing functionality and usability in desktop views. The calendar and event details should be printer-friendly, too.

Calendar View

- Can be embedded into the Library website or configured to match the chrome, fonts and colors of the Library website.
 - Ability to embed part of a calendar view on a specific web page (e.g. upcoming week of children's programming on Children's landing page).
- Can be viewed by month, by week, and as a chronological event listing, selectable by the viewer.
- Integrate calendar search within site search, with clearly differentiated results.
- Indicate visually within top-level view the following characteristics, and the ability to view events (filter) by these items as well:
 - Shows title, times, and room on each event; and links to event detail information.
 - Registration required vs. drop-in events
 - Spots available
 - Waitlist started
- Outside calendar integration (e.g. iCal, Google Calendar, etc.) so users can add events to their own calendars.
- Ability to categorize events into specific categories, and to filter events shown on calendar by one or more categories. Filters in use should show at the top of the calendar.
 - Ability to provide visual distinctions for different audiences, either color-coding or symbolization for example. Must also address accessibility for low-vision viewers.

- Categories should include the following, all of which should be customizable by staff:
 - Audience (e.g. adults, teens, children, all ages/family, and customized audiences such as: age 14+, or grades 3-5, etc.)
 - Event sponsor (e.g. outside group, Library event, staff only, etc)
 - Event type (e.g. movie, crafts, lecture, workshop, etc.)
 - Location of event (e.g. virtual, at Library, offsite, etc.)

Event Detail View

- Provide HTML-formatted full event information as created in room reservation system.
- Uses Library fonts, colors and chrome.
- Ability to view any attached documents to the event details page.
- Ability to view and complete registration or waitlist form if needed. Ability for patrons to cancel event registration via library card or email matching.
- Ability to provide means for users to add to their own calendar, such as iCal.
- Ability to create a friendly URL directly to the event detail page for access from external websites or to use in email communication.

Museum Passes

Implement an application for museum pass management to include:

- Ability for users to log in with library card to reserve, modify, and/or cancel with notification.
- Staff view for inputting, daily printouts, reports, error logging.
- Ability of staff to set flexible rules on number of passes per/week or month depending upon time of year (e.g. usually two per week per library card except for one per week during school vacation weeks)
- Ability for staff to limit how far in the future passes can be reserved
- Ability for staff to communicate via email or text with patrons who've reserved passes
- Ability to send automatic reminders to pick up and return tangible passes
- Ability to accommodate printable and mobile passes, including downloading or emailing a mobile pass to a device
- Ability for multiple public views including:
 - by date (calendar)
 - by location (map)
 - by type of pass (print, coupon, or returnable pass)
 - by museum (by name)
- Easy way to show calendar view of dates that a pass is available and unavailable.
- Museum view to include:
 - image (museum logo)
 - link to the museum's website
 - physical location and link to map
 - pass details (# of people, pricing, etc.)

- donor/sponsor information
- Ability to sort via:
 - museum type (e.g. aquarium, zoo).
 - location.
 - subject (e.g. cultural, science, history).
 - availability

Process

Discovery and Design

The vendor will interview and work with the Library directors, webmaster, and additional staff as needed to design the architecture and navigation structure required to meet the Library's needs.

Implementation

Vendor is responsible for:

- Initial CMS installation, configuration, and customization.
- Creation of initial set of website templates needed to go live.
- Development and/or modification of any required code.

Content Migration

It is preferred that the vendor be responsible for migration and reformatting of all content from existing Library website into new CMS.

Testing

Vendor is responsible for initial testing of website to determine launch readiness, including:

- broken links
- missing images
- page format problems

Training and Documentation

Vendor is responsible for providing a full set of user and administrator documentation that includes instructions on how to perform all necessary functions.

Vendor is responsible for pre-launch training for webmaster and any additional staff.

Requirements

Expressions of interest from qualified firms are welcomed and must include the following:

- Firm name, name of individual who would be overseeing this project, mailing address, phone number, email address, and web address.
- Cover letter describing the firm's qualifications and past experience with particular emphasis on experience developing library websites.
- Examples of three recent websites (within the past 18 months) that demonstrate design and utility features applicable to this project.
- Examples of two or three excellent library websites with a brief explanation of what makes these sites stand out.
- A work plan that contains methodology, project milestones, and a timeline for project. Total project timeline should not exceed 16 weeks.
- A project budget, including staff time and up front and ongoing costs for any new software. Total project budget, including alternates, not to exceed \$35,000. *NOTE: Continuing maintenance and hosting contract costs should be noted separately from the project budget. All software purchases to be made in consultation with Library staff.*
- References including contact information for at least three libraries or other organizations for which the consultant has provided web design and development service.
- Examples of accessibility standards and knowledge of WCAG AA guidelines.

Selection Criteria

- Demonstrated knowledge, skills, and experience in web design for public libraries and/or other non-profits.
- Understanding of usability design & testing, web design best practices, and trends in library websites and library user experience.
- Familiarity with web accessibility standards for persons with disabilities, non-native English speakers, and mobile devices.
- Ability to satisfy all requirements while meeting deadlines and operating within budget.
- Recommendations from past clients.

The Town will evaluate all timely responses to ensure that all required submittals have been included in the responses and that all responses meet the selection criteria. Proposals that are deemed to be complete shall be presented to a selection committee consisting of the Director, Deputy Director and Staff Website Committee who will recommend one or more candidates for consideration by the Board of Trustees' Executive Committee.

The Library Director, Deputy Director, or the Library Board of Trustees may request one or more consultants attend a meeting, make a brief presentation, and answer questions regarding their proposals. The Library reserves the right to reject any and all proposals. The Library reserves the right to cancel the award of the contract at any time prior to the execution of the contract by both parties.

Any proposal that fails to include all of the above required information shall be deemed unresponsive and will not be afforded a complete review by the selection committee.

The Town will award a contract resulting from this solicitation to the responsible bidder whose offer meets the stated requirements for technical expertise, project experience, qualifications, project approach, client references, and proposal quality at the lowest price.

Proposals may be submitted to:

Cary Library
Attn: Emily Smith, Deputy Director
1874 Massachusetts Avenue
Lexington, MA 02420
esmith@lexingtonma.gov

Proposals are due by Wednesday, September 30, 2020 at 5:00 p.m. EST. Electronic submissions are preferred and should be sent to esmith@lexingtonma.gov with a subject line: "Cary Library Website Redesign." Print proposals should be submitted in a sealed envelope marked with "Cary Library Website Redesign." For information and specifications pertaining to this project, please contact Emily Smith at esmith@lexingtonma.gov or 781-698-4402.

The Cary Memorial Library is an equal opportunity employer and supports Women and Minority owned Business Enterprises.