

# AMERICAN LIBRARY ASSOCIATION EVENT MANAGEMENT SYSTEM RFP

Release date: August 28, 2012 Responses due: October 15, 2012

## PROJECT DESCRIPTION

The American Library Association (ALA) is seeking a vendor to

- replace our program/abstract management systems across the association with a single system to solicit and evaluate program proposals and poster sessions
- replace our session request submission form used to request meeting room and resource requirements
- replace our speaker management systems across the association with a single system to track and store information about speakers
- replace our room and resource management system used to assign meeting room resource requests (requests made from session request submission form above) to convention center and hotel rooms

with a licensed or open source system that provides those functionalities and can read from and write to iMIS 15, our association management system, preferably using Microsoft SQL.

The system should have an event portal to present in as seamless a manner as possible program/abstract proposal management, meeting definition management, speaker management, and room resource management. The system must support multiple functions for multiple meetings.

Timeline: Work to commence in November 2012 and to be completed within eight months (June 2013).

## MUST INTEGRATE WITH

- ALA's association management system, current version: iMIS 15.1.3.8125. Going to 15.2.
- iMIS currently uses Microsoft SQL Server 2005 9.00.4053.00 (X64). Going to SQL 2008
- Shibboleth 2.0 is ALA's single-sign-on system for authentication.
- Email server(s)

## REQUIRED FEATURES

## COMPLIANCE

System must comply with best practices in interaction design, usability and accessibility of the forms. Appendix E contains the detailed system requirements for accessibility.

---

## MAINTENANCE

System must be capable of being maintained and updated primarily by ALA staff and member volunteers. Conference services staff should be able to create new reports and modify existing ones that assist with system maintenance.

ALA staff and member volunteers with appropriate permissions should be able to manage content and set up even when working from outside the ALA network using any current web browser.

---

## REQUIRED PROCESSING CAPABILITIES

System must work with Shibboleth, ALA's single-sign-on system, for authentication.

Appendix A contains the detailed system processing requirements.

---

## ACCOUNT CREATION AND MAINTENANCE

System must use existing account creation through ALA's website.

User account maintenance must be a multi-level approach. The global administrator can assign permissions to others who can maintain user permissions for this system.

User profile data will be maintained using tools outside this system. The data will be made available to this system using Shibboleth.

Please describe the development methodology you will use to create this system emulating the provision of data via Shibboleth.

---

## AUTHENTICATION

Via Shibboleth, against iMIS, for ALA staff and member volunteers.

## PROPOSAL FORMAT

Please include the following elements in your response to this request for proposal, in the order below.

## SYSTEM DESCRIPTION & CONFIGURATION OPTIONS

Describe the system you propose to configure, and detail the web services or other methods required to read and write from iMIS. Touch on your plan for providing the required features described above, and describe any desirable or optional features included in your price. Describe the standard report options that will be available to ALA.

## TESTING

Describe the plan for assuring that the system works properly and providing access to site visitors using assistive technologies.

## TIMELINE

Describe the proposed timeline for all phases of this project. When would you start work on the project? When would the project be completed? Will your approach call for an overnight launch or a phased approach? Be sure to include time for accessibility, interaction, and functionality testing.

## COMMUNICATION & PROJECT MANAGEMENT

Identify the tool(s) to be used to communicate with ALA and manage the project.

## WARRANTY & SUPPORT OPTION

Describe any warranty provided as well as your system support plan and terms.

## FUTURE DESIGN CONSIDERATIONS

While these features are currently out of scope, the system must be capable of being configured to produce these functionalities in the future. Briefly describe how the system and configuration proposed would make these options possible during a future iteration. *(Optional: Price one or more options.)*

- Mobile capabilities.
- System might require offline access using HTML5 in a subsequent phase.

## PRICING

Provide a total price and a breakout per phase for all requirements. If the proposed system is not open source, breakout any charges for licenses. Include pricing for follow-up support. *Optional: Pricing for desirable items and/or future capabilities.*

## ABOUT YOUR COMPANY

1. Provide information about your enterprise's legal structure, length of time in business, principal business activities, and other details you may wish to communicate.
2. Describe your enterprise's principals; also provide relevant background information on those persons likely to be assigned to this project.
3. Provide at least three references for similar projects. Describe any projects involving iMIS 15 integrations.
4. If your enterprise has been in business less than five years, be prepared to provide ALA with financial statements for the past three years.

## QUESTIONS, DEADLINE & SUBMITTAL INFORMATION

Submit questions to Sherri Vanyek, 312-280-2437.

Proposals are due on October 15, 2012. Send your proposal electronically to [svanyek@ala.org](mailto:svanyek@ala.org) and [jlevine@ala.org](mailto:jlevine@ala.org).

To prevent your proposal from languishing in a spam filter, leave a voicemail for Sherri Vanyek with the sent from email address information once you have emailed your proposal.

## APPENDIX A: PROCESSING REQUIREMENTS FOR EVENT MANAGEMENT SYSTEM

### INTRODUCTORY

This document defines an event portal to present in as seamless a manner as possible for meeting definition management, program/abstract proposal management, room resource management, and speaker management. The system must support multiple functions for multiple meetings.

### SCOPE

- Replace Program/Abstract Management systems across the association with a single system to solicit and evaluate program proposals and poster sessions.
- Replace Session Request Submission Form used to request meeting room and resource requirements.
- Replace Speaker Management systems across the association with a single system to track and store information about speakers.

- Replace Room and Resource Management system used to assign meeting room and resource requests to convention center and hotel rooms.

#### REQUIREMENTS FOR REPLACING SESSION REQUEST SUBMISSION FORM

- System must work with Shibboleth, ALA's single-sign-on system, for authentication.
- Every meeting must have its own portal.
- System must provide a template to allow each portal have its own branding. (e.g. ALA, Divisions of ALA, etc.)
- System must be capable of handling multiple meetings simultaneously.
- System must be capable of handling thousands of meeting session requests simultaneously.
- The system will have several types of meeting request submission forms based on the type of meeting (e.g. Committee Meeting, Discussion/Interest Group, Affiliate Event, Exhibitor session, etc.).
- Each submission form will display only fields associated with the type of meeting defined above.
- The system will display specific submission forms and form elements based on user authentication and type of meeting (e.g. member, staff, exhibitor).
- Each form will be defined with a combination of fields listed in Appendix B.
- System will allow a controlled list of staff, members, or exhibitors to edit meeting session requests based on a date range for a meeting session.
- System will provide multiple levels of permission based on user authentication (e.g. conference services staff will be able to change requests after final submission).
- There must be programmatically enforced cutoffs for certain types of actions. For example, a meeting must have a cutoff for new room requests, then later cutoffs for changes
- System will have a wizard application to guide users through filling out the meeting session submission form.
- System will provide a reporting tool to be used by meeting planners to view the meeting requests in different formats with different filtering (e.g. a report of all AV Equipment for a given meeting, a report of meeting times required for a session, etc.).
- Display options: System must make it possible to aggregate information in various ways (by type of meeting, meeting times, date, topic, etc...) for display on the management/reporting portal.
- The system will acknowledge completion and send an email confirmation to the user once a request is entered or changed.
- System must comply with best practices in interaction design, usability and accessibility of the forms.

- System will populate speaker/contact information based on iMIS ID.
- Desired: Ability to add hidden fields that contain the cost of each AV item so that a total can be displayed on confirmation and in the verification email.

#### REQUIREMENTS FOR REPLACING PROGRAMS/ABSTRACT MANAGEMENT SYSTEMS

- The meeting request for program and poster session submission form will be handled through the event portal described above.

Below are the specific requirements for program/abstract management.

- System must work with Shibboleth, ALA's single-sign-on system, for authentication.
- Every meeting must have its own portal.
- System must provide a template to allow each portal have its own branding. (e.g. ALA, Divisions of ALA, etc.)
- System must be capable of handling multiple meetings simultaneously.
- System must be capable of handling thousands of program/ abstract requests simultaneously.
- The fields for the program/poster submission form are defined in Appendix C.
- System must allow review by designated individuals or groups.
- System must allow an authenticated user the ability to make public selected elements for viewing, comment, or voting.
- System must allow committee members, specific individual, or group to vote/comment on items.
- System must allow export of items to a single document – such as list of presentations.
- System must have the ability to send email directly to submitters.
- System must have the ability to send email to multiple individuals and groups regarding updates/changes to program material.
- System must have the ability to send multiple individuals and groups approval /rejection emails.
- System must have the ability to track changes to submissions.
- System must have the ability to archive past submissions.
- System must allow for scheduling/tracking issues.
- System must use iMIS ID to populate contact information.
- System will provide a reporting tool to be used by reviewers to view the program/abstract requests in different formats with different filtering (e.g. a report of all approved programs and abstracts for a meeting, current state of review for a program or abstract, etc.).

- Display options: System must make it possible to aggregate information in various ways (by meeting, date, topic, etc...) for display on the management/reporting portal.
- The system will acknowledge completion and send an email confirmation to the user once a request is entered or changed.
- System must comply with best practices in interaction design, usability and accessibility of the forms.
- System should allow users submitting proposals to attach documents.

#### REQUIREMENTS FOR ROOM AND RESOURCE MANAGEMENT SYSTEM

- The room and resource management system must be part of the event management portal system described above.

Below are the specific requirements for room and resource management.

- System must work with Shibboleth, ALA's single-sign-on system, for authentication.
- System must be capable of handling multiple meetings simultaneously.
- System must be capable of handling thousands of rooms and resources for a meeting simultaneously.
- System will contain a database of available rooms and resources.
- System must allow for multiple sessions in one room on one time slot.
- System will alert staff to double-booking of rooms or speakers.
- System must allow for administrator to override room and resource assignments (eg, double-booking resources).
- System will provide a reporting tool to be used by planners to view the room assignments in different formats with different filtering (e.g. by unit, location, type, etc.).
- Display options: System must make it possible to aggregate information in various ways (by unit, location, type, meeting, date, topic, etc...) for display on the management/reporting portal.
- System must allow exports of all data (e.g. text, pdf, xlsx)
- System must have robust search capabilities.
- System must allow for bulk editing of resources and room assignments.
- System must have a robust import feature to populate available room and resources.
- System must allow for staff to add additional fields, change existing field labels, and rearrange order of fields.
- System must auto-assign rooms based on meeting room submission requests outlined in Appendix A.

- System must provide an XML feed required session data to the ALA Conference Scheduler, recorded archive, and program book.
- System must comply with best practices in interaction design, usability and accessibility of the forms.
- Staff should be able to enable and disable views, fields, and menu items on a group-by-group basis as needed.
- System must allow for speakers to approve recording agreements and notify ALA staff when approvals are submitted.

#### REQUIREMENTS FOR SPEAKER MANAGEMENT SYSTEM

- The speaker management system must be part of the event management portal system described above.

Below are the specific requirements for room and resource management.

- System must work with Shibboleth, ALA's single-sign-on system, for authentication.
- The fields for the database are defined in Appendix D.
- System must be capable of handling thousands of speaker records simultaneously.
- System must track consent forms, images, and electronic signatures.
- System will provide a reporting tool to be used by meeting planners to view the speaker data in different formats with different filtering (e.g. expertise, bios, consent forms, etc.).
- Display options: System must make it possible to aggregate information in various ways (by past meetings, topics, bios, etc...) for display on the management/reporting portal.
- The system will send an email confirmation to the speaker once the assignment is finalized.
- The system will write activity records for chosen speakers to our iMIS 15x database.
- System must comply with best practices in interaction design, usability and accessibility of the forms.



## APPENDIX B: SESSION REQUEST FORM FIELDS

Section	Field	Notes
Session Information		
	Meeting ID	Required, assigned automatically, sequential in beginning-alpha order
	Title	Required
	Description for Print Program	Limit 100 Words
	Description for Online Conference Scheduler	No limit on text entry
	Capacity	Text entry box for a number, plus an option to select "unlimited capacity"
	Status	Single select dropdown menu
	Type	Single select dropdown menu (Exhibitor, Poster, ALA meeting)
	Length	1hr, 1.5 hrs Forms for members will display standard times only; The staff form will let ALA staff enter non-standard session times, present full range of AV options.
	Meeting Type	Multi-select menu Examples: Committee Meeting Poster Session
	Sponsor: ALA Unit(s) Subunit(s)	Multi-select menu
	Co-Sponsor	Multi-select menu
	Should this meeting be included in the conference program book?	Radio button that defaults to "yes"
	Should this meeting be displayed in the online conference scheduler?	Radio button that defaults to "yes"
	Is this meeting closed?	A radio button that defaults to "no"
	Estimated Attendance	Numerical entry field
	Preferred Day	Single select dropdown menu
	Preferred Time	Single select dropdown menu
	Additional Meeting Information	Comment field
	Please list information or special requests pertaining to your meeting. Add any comments to this box, including any off-site	Comment field

	event information and co-locations	
	iMIS Committee Code	Text entry field
	Ticketed Meeting Costs	Text entry field
	Ticketed Meeting Deadline	Date field
	1 <sup>st</sup> Subject Choice	For program and discussion groups meeting types only, make one subject heading required. Single select dropdown menu
	2 <sup>nd</sup> Subject Choice	Single select dropdown menu
	3 <sup>rd</sup> Subject Choice	Single select dropdown menu
	4 <sup>th</sup> Subject Choice	Single select dropdown menu
	5 <sup>th</sup> Subject Choice	Single select dropdown menu
	Content Areas	For program and discussion groups meeting types only, make one "Content Area" required. Single select dropdown menu
	Additional Tags	Free form tags as additional subject headings
	Session Hashtag	Text entry field
	Name of the Onsite Contact	Text entry field
	Contact information for the Onsite Contact	Text entry field
Room Layout		
	Seating Arrangement	Conference: <= 20 people; no AV, Hollow:21-40 people;no AV, Rounds: 41-99 people; default AV setup = screen, projector, floor mic, podium, podium mic, Theater: >-100 people; default AV setup = screen, projector, floor mic, podium, podium mic,
	Head Table	Default setup for all requests for Head Tables; staff will be able to override the selection.
	Extra Chairs	Radio button that defaults to "no"
	Standing Podium Needed	Displays to staff only
	Hotel Room Layout Comments	Displays to staff only
	Staff Room Layout Comments	Displays to staff only
Catering	Ordering Catering	Radio button, defaults to "no"
	Type of catering	Checkboxes
	Buffet Required	Single select dropdown menu
	Name of the person responsible for ordering catering	Text entry field
	Contact information for person responsible for ordering catering	Text entry field
	If needed, please enter	Text entry field

	your ALA Charge # (xx-xxx-xxxx-xxxx)	
	Catering Comments	Text entry fields
Audio Visual		
	Audio Visual	Radio button that defaults to “no”
	Extension cord	Radio button that defaults to “no”
	Cord/powerstrip	Numerical entry field
	Flip Chart & Markers	Numerical entry field
	LCD Projector	Numerical entry field
	Screen	Numerical entry field
	AV/cart?	Numerical entry field
	20” Monitor	Numerical entry field
	32” Monitor	Numerical entry field
	Podium Microphone	Numerical entry field
	Internet Connection	Text entry field
	Include a hidden cost field for each AV item	Number fields
	Estimated cost for AV (based on hidden cost fields)	Number field, requires calculations to sum total and add tax + standard service charge based on hidden cost fields
	If needed, please enter your ALA Charge # (xx-xxx-xxxx-xxxx)	Text entry field
	Audio Visual	Text entry field
	AV Comments	Comment box
Proposed Speakers		There can be many speakers for one session.
	iMIS ID:	Numerical entry field
	Speaker Type	Single select from dropdown menu
	Name:	Text entry field
	Title:	Text entry field
	Company/Institution	Text entry field
	E-mail address	Text entry field
	URL	Text entry field

## APPENDIX C: PROGRAMS/ABSTRACT FORM FIELDS

<b>Annual Conference Program/Abstract Proposal Form:</b>
Name of Group or Individual Proposing Program:
iMIS ID#:
Program Organizer's Name: (List one person only as the primary contact for program details)
Title:
Organization:
Address:
City, State, Zip:
Daytime phone:
Email:
If you presented this program at another conference, where:
Program Title:
Program Description (Include an abstract of 75 words or less to be used for promotions. Include type of program, e.g., panel, single speaker, discussion, etc.):
Speaker(s)/Presenter(s) Name(s) and Affiliation(s):
Please list the program's goals and learning outcomes: Outcomes should be clear, concise, and measurable. What will the attendee take away and what will the attendee be able to accomplish after attending the program?
Describe target audience:
Estimated audience size (used to assign room space):
Preferred program day:
Preferred program time(AM/PM; only standard times allowed):
Program considerations (i.e., speaker or date restrictions):
Program conflicts (speaker conflicts, meeting times not to schedule against, etc.):
Audiovisual/Computer Equipment Needs:
Room Set Up: Rounds, Theater, Other
List any ALA division or Affiliate "in name only" co-sponsors:
<i>The co-sponsoring group will endorse the program but will not have an active role. If applicable, the co-sponsorship must be approved by both the co-sponsoring groups' division board and the group presenting the program</i>
Content area
Subject area required

## APPENDIX D: SPEAKER DATABASE FIELDS

[illegible]

## APPENDIX E: ACCESSIBILITY REQUIREMENTS

ALA's web resources must comply with [Web Content Accessibility Guidelines \(WCAG\) 2.0](#); [understanding the guidelines](#), a [quick reference guide](#), and information on [recommended techniques](#) are available from the W3C Working Group.

## APPENDIX F: ABOUT THE AMERICAN LIBRARY ASSOCIATION

The American Library Association (ALA), founded in 1876, is the oldest and largest national library association in the world. Its concerns span all types of libraries: state, public, school, and academic libraries, and special libraries serving persons in government, commerce, and industry, the arts, the armed services, hospitals, prisons, and other institutions. ALA has about 65,000 members in the United States, Canada, and over 115 countries. The Association's mission is to provide leadership for the development, promotion, and improvement of library and information services and the profession of librarianship in order to enhance learning and ensure access to information for all.

With a membership of libraries, librarians, library trustees, and other interested persons from every state and many countries of the world, the Association is the chief advocate for the people of the United States in their search for the highest quality of library and information services. The Association maintains a close working relationship with more than 70 other library associations in the United States, Canada, and other countries, and it works closely with many other organizations concerned with education, research, cultural development, recreation, and public service organizations concerned with education, research, cultural development, recreation, and public services.

In order to meet the needs of its varying constituencies and their concerns, ALA has developed into a complex organization with an array of membership units, including the ALA Council (the overall governing body), the Executive Board (central management body), ALA committees, 11 Divisions, 19 Round Tables, and 57 autonomous chapters of the ALA, each with its own elective structure. In sum, approximately 5,000 members are actively involved in the work of the Association.

The ALA staff of over 270 persons consists of a small publishing enterprise in Middletown, CT, a lobbying and public policy office in Washington, D.C., a division office in Philadelphia, PA and the main headquarters in Chicago. The information needs of the staff are as broad as the Association's activities and also include association management issues such as meeting management, governing board operations, finance, and marketing. Most staff are "knowledge workers" with regular and frequent need to gather and synthesize data, information, and research in support of member activities or constituent information needs.