

**Clifton Park-Halfmoon Public Library  
Request for Proposal**

***Consultant Services:  
Website Redesign***

**Proposals Due:  
Monday, October 30, 2017  
5:00 PM EST**

Clifton Park-Halfmoon Public Library  
Alexandra Gutelius, Library Director  
475 Moe Road  
Clifton Park, NY 12065

## NOTICE TO CONSULTANTS

NOTICE IS HEREBY GIVEN that the Clifton Park-Halfmoon Public Library will receive sealed proposals for **Website Redesign**. Such proposals must be filed with the Clifton Park-Halfmoon Public Library at 475 Moe Road Clifton Park, New York 12065 by **October 30, 2017 5:00 PM EST**.

Proposal forms and specifications may be obtained by contacting Alexandra Gutelius, Library Director of the Clifton Park-Halfmoon Public Library at the above mentioned address (Telephone: 518-371-8622) or by emailing [agutelius@sals.edu](mailto:agutelius@sals.edu). Consultants requesting arrangements other than U.S. Mail or email shall be responsible for making such arrangements and all associated costs.

NOTE: The Library shall not be held responsible for the completeness or accuracy of any documents received by a consultant that were not directly issued to that consultant by the Clifton Park-Halfmoon Public Library.

Any consultant submitting a proposal based on incomplete or inaccurate information resulting from documentation received from any third party, shall not have cause for relief from award or completion of a contract in accordance with the official documents on file with the Clifton Park-Halfmoon Public Library.

It is HIGHLY suggested that all consultants interested in participating in this RFP contact the Clifton Park-Halfmoon Public Library directly at the above address or telephone number to assure they have received the most accurate and up to date material concerning this contract.

The Library does not offer or supply anyone the list of people that have obtained a copy of these proposal specifications or cost estimates for the project prior to the awarding of a contract. NO EXCEPTIONS ARE MADE TO THIS POLICY.

Clifton Park-Halfmoon Public Library reserves the right to reject any or all proposals.

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## INTRODUCTION

The Clifton Park-Halfmoon Public Library is seeking proposals from qualified firms or consultants to *design and develop a new website* for the Clifton Park-Halfmoon Public Library (“CPH” or “Library”). The selected consultant will plan, design, build and launch a website that meets the Library’s brand and marketing strategies in keeping with the Long Range Strategic Plan developed by the Board of Trustees. The consultant will also train staff to update and maintain the website. As part of its work developing the Library’s website, the selected consultant will work primarily with Library’s Technology and Communications staff and will conduct design reviews for selected members of the Board of Trustees.

The goals of the website redesign are to:

- Create an engaging, patron-centered website
- Better inform patrons and non-users about library programs, services and collections
- Provide easy functionality for staff to update and edit the site
- Streamline the website structure for easier navigation and content discovery
- Deliver dynamic content
- Modernize and enhance visual appeal and presentation
- Improve SEO
- Implement responsive design
- Comply with accessibility standards

Problems with the current website:

- Too many pages and text heavy
- No consistent formatting
- HTML/CSS updating is time consuming
- Very little dynamic content, manual changes are necessary
- Design is out of date and not responsive on mobile devices
- Content for teens is on a separate WordPress site

The Library’s Strategic Plan, Style Guide, and Brand Book should inform the design, style, audience and mission of the website. These plans are available on the Library’s website on the Website Redesign page. (Available October 2, 2017).

## LIBRARY BACKGROUND

The Clifton Park-Halfmoon Public Library is a special legislative tax district library serving the communities of Clifton Park and Halfmoon, a population of approximately 56,000. In 2017 there were 41,699 card holders, a total circulation of 806,050, 426,376 visits to the library and 251,229 website visits. The Library has 49 FTE staff members representing 30 salaried employees and 90 part time employees. The 2018 adopted budget was \$4,416,934.

The Clifton Park-Halfmoon Public Library, formerly the Shenendehowa Free Library and the Shenendehowa Public Library, has been in operation since 1969. The Library is governed by an 11 member Board of Trustees representing the towns of Clifton Park and Halfmoon. Library operations are overseen by the Library Director.

The Library is located in a suburban area north of Albany, NY (the New York State Capital) and many residents work for the State of New York or several other large employers including GE, Global Foundries and a number of colleges and universities. The demographics in the community are shifting to include a more multicultural population and this is reflected in the patron population at the Library.

The Library operates within a 55,000 square foot facility that was opened to the public in December 2006. Since that time, use of the building and collections has grown and changed. The demand for digital materials is growing, while use of print materials is declining.

The Library plays a key role in educating, entertaining and enriching life in the community. Annually the Library hosts over 1,200 programs, including author talks and signings, family and multicultural programs, and technology programs, to name a few. Further, nearly 440 community programs and meetings were held at the Library's facility in 2016.

The Friends of the Clifton Park-Halfmoon Public Library is a volunteer organization that supports CPH in a myriad of ways. Their partnership includes championing the Library efforts, endowing financial gifts for special projects, initiating and organizing cultural and educational events. Consideration must be given to this important organization as one of the many audiences of our Library and partner to support CPH's mission and vision.

## **SCOPE OF WORK & REQUIREMENTS**

CPH intends to contract with a consultant to work cooperatively with Library staff, as well as, select community stakeholders and the Board of Trustees as appropriate to create a new, intuitive, modern website that will incorporate the Library's brand.

The Library requires a content management system (CMS) for the new website. The system must have the following requirements:

### Staff Maintenance:

- Intuitive editing and updating process for users who do not possess knowledge of HTML or CSS languages.
- Patching and updates of all apps and site framework should be clear, as well as a system to alert users when patches and updates are needed.
- Easy to execute and maintain a backup schedule of all site components.
- Ability to set permissions for different user accounts.
- Provide applications for site maintenance (broken links, 404 redirects, etc).

### Site Functionality and Design:

- Deliver dynamic content triggered by dates or variable flags.
- Responsive design that is automatically resizes and adjusts content based on screen resolutions and mobile devices as well as retina display ready.

- Include modules for specific library needs (see description below for each module\*) and make suggestions for additional features/modules.
- SSL encryption (https).
- Run all site functions without the need of Flash or Java applets.
- Allow for future implementation of e-commerce.
- Cross-browser compatibility.
- Search box with choice of either full site search or catalog search.
- Convert current PDF attachments to readable web pages or forms.

### Integration

- Keyword optimization with improved SEO, title and metadata descriptions, include implementation of Google analytics.
- Seamless social media integration for platforms such as Facebook and Instagram.
- Preserve existing integration with Polaris, Constant Contact, EmailmeForm, and Evanced.
  - The Library is currently looking for and open to alternatives to Evanced for scheduling events and room reservations.
  - The Library is open to alternatives to EmailMeForm providing the same functionality is available and forms can be embedded within the Library website template.

The Library requires the website design and style be consistent with the branding (style guide) and marketing plan of the institution. This includes graphics, colors and language.

Any design must be web accessible (WCAG 1.0, WCAG 2.0, Section 508, Disability Discrimination Act, Screen Reader Compatibility) and consistent with ADA compliance. For guidelines please see <https://www.ada.gov/pcatoolkit/chap5toolkit.htm>.

### \*Modules Required:

The following requirements make the assumption that the website works under a header/footer configuration within the CMS. Modules are subject to change based on the discovery phase and suggestions made by the consultant.

- Library Information

The Library information (contact information and hours) may appear in multiple parts of the library's website in addition to the header and footer. This request is for a module where the Library can maintain contact information from a centralized location. The user should be able to update the information in one place then see those changes reflected automatically on any page containing contact information and/or library hours.

Potential Fields:

Address, town, state, zip, phone\_number, fax\_number, email, lib\_day, lib\_hours\_open, lib\_hours\_close

- Resource Links

The Library provides links to various databases and user resources. These links show up on multiple pages. This request is for a module that stores information for the links so they can be updated from one centralized location. If any field on a link is added, updated or changed

the user should be able to see those changes reflected automatically on any page containing the link.

Potential Fields:

URL, title, icon, description

- Promotions of Events and Services

Public events are featured on the front page of the Library's website. The Library would like to continue featuring the events on the front page, however they are currently managed by a manual process. This request is for a module that will maintain a list of events and display them on the front page. When the date of the event has passed the page should automatically stop displaying the event.

Potential Fields:

Promotion\_name, photo, promotion\_title, description, link, date

- Employment Opportunities

This module entails having a uniform and consistent format for posting multiple job descriptions.

Potential Fields:

Job\_name, job\_description, job\_contact

- Closed Dates

The Library is closed for multiple holidays every year. The Library would like to be able to preset the closing dates and have the website dynamically display closing information on any day that falls into the pre-established holidays.

Potential Fields:

Holiday\_name, holiday\_date

- Timed Messages

There are times when a resource is not available on our website due to a maintenance or technical issue. The Library would like to be able to create messages to explain a loss of service and set this message to appear during specific dates/times.

- Board Portal

The Board of Trustees require a secure portal to view reports and confidential documents.

General features will need to include a user login and links for current reports and documents.

## PROJECT PHASES

CPH requires weekly project meetings with consultant's web development team throughout the phases below.

1. Discovery and Planning

Conduct necessary research focused on the Library's culture to determine audiences and perceptions using existing library marketing plan (provided by the Library) as well as

interviews with administration/staff. Audit current library website to identify useful or obsolete practices and suggested improvements. Develop site map including a navigation plan that is streamlined and efficient. CPH will provide current web hosting plan details for evaluation.

Deliverables:

- Findings summary that details how the new design will incorporate brand strategy and targets identified audiences.
- Findings summary on improving current front end design and back end coding practices.
- Preliminary site map.
- If contractor provides hosting as an option, proposal of hosting plan. Detail what is included (server space, updates to CMS, security, application and widget updates).

## 2. Design and Approval

Develop three design drafts which include wireframes and mock-ups of example pages based off of previously established sitemap. Begin approval process with appointed website redesign team.

Deliverables:

- Wireframe designs for 3 templates.
- Design mock ups for 3 templates including color, graphics, header, footer and navigation bar for Board approval.
- Selection of final design by appointed staff and trustees.

## 3. Development and Testing

Having approved a design, the implementation of modules and dynamic content delivery systems can now be implemented and tested for functionality. This will include a development phase on the part of the consultant immediately followed by a testing phase by the website team and selected staff/patrons. Testing scripts are to be developed and provided by the consultant.

Deliverables:

- Summary of findings for website team on the existing functionality with any notes, adjustments or suggestions.
- Developed modules for content creation, custom or pre-existing, for testing.
- Staff training for adding/editing/deleting content.

## 4. Content Analysis and Generation

Given an approved site map and design, the Library will begin to manufacture text-based content for the consultant to apply to the chosen design. We estimate there will be approximately one hundred (100) pages. Content will include, but not limited to text, links and images. All images and pages must be optimized for fast loading. Any links that reference

outside pages must open in a new browser tab or window. Consultant is responsible for creating a website style guide for library content to adhere to. The Library can provide existing photos, which may meet criteria, but if other library specific photos are needed it will be the responsibility of the consultant to provide photographs of the library.

Deliverables:

- Website style guide.
- Collection of content which corresponds to each page, provided by the Library.
- Sample pages from the consultant exhibiting layout, styles and options.

## 5. Final Review

The Library and website team will review the content, design and functionality of the website thoroughly for any modifications.

Deliverables:

- Summary of modifications presented by website team.
- Documentation of modification.
- All documentation and manuals for maintenance of the website.

## 6. Website Launch

After final review the website will go live. This entails the upload of the CMS and all database/associated files. If hosting configuration has changed, DNS records will be altered to reflect the new changes.

## 7. Post Launch Support

After the website is launched, the consultant must work with library staff to provide a post launch support period of 90 days. This is to ensure that all functionality is working properly and that content is appearing correctly.

## TIMELINE

CPH expects the selected consultant to complete all activities defined above (up to and including website launch) within **six months** of contract start. Consultants are expected to develop a project plan that defines milestones and deliverable due dates in accordance with this timeline. Such project plans should ensure that all phases of the stated project are developed and delivered to the Library within the six month timeframe. However, recognizing that unforeseen circumstances may arise that delays this project, CPH, at its sole discretion, may extend the terms of the contract to allow additional time to complete the services defined in this RFP.



## PROPOSAL SUBMISSION AND REQUIREMENTS

1. All proposals shall be delivered to and received at the exact location indicated on the “Notice To Consultants” prior to the time indicated in the “Notice To Consultants”. No proposals will be accepted after the designated time indicated in the “Notice to Consultants”. NOTE: This includes any changes listed on the latest addendum issued by the Clifton Park-Halfmoon Public Library, if any. Delay in mail delivery is not an exception to the deadline for receipt of proposals.
2. One (1) original proposal and eight (8) copies of each proposal shall be submitted in a sealed envelope, box or other container. The outside of the envelope or container should include the RFP name, due date and time and company name.
3. Questions or clarifications about the scope of work be made in writing to the Library. Such questions must be in the possession of the Library by the date indicated in **Submission Deadlines / Tentative Project Schedule** unless otherwise indicated. Verbal questions may not be entertained. Consultants are not to contact any employee of the Library other than Alexandra Gutelius.
4. The **Proposal Form** should be submitted in a sealed envelope separate from the rest of the proposal documents. The envelope shall indicate the name of the RFP being responded to and the name of the firm submitting the cost proposal.

## PROPOSAL FORMAT

In order to fully respond to this RFP, each proposal must include:

1. A **cover letter** providing a description of the Consultant, including its name and address, and the name, address, telephone number and email address of the Consultant’s principal contact.
2. An **Executive Summary** of the proposal, not exceeding one page in length, which summarizes the highlights and benefits of the proposal to the Library.
3. A **work plan** that includes a:
  1. Description of the website redesign methodology recommended for CPH and to be used to meet the requirements of this RFP.
  2. Project plan that specifically describes how the Consultant intends to successfully complete each phase of the project defined above. The project plan should clearly identify all of the tasks and activities the Consultant will complete to successfully provide the services requested in this RFP.
  3. Project timeline and schedule for completion of all activities, that should demonstrate all work will be completed within the six-month timeframe defined in this RFP.

4. A **summary of qualifications** for the Consultant, which includes recent and relevant experience.
5. A **list of key personnel** who would be providing services. For each person listed, include the relationship with the Consultant, including current job title, employment history with the Consultant, and resume that include the type and length of any relevant experience.
6. **References** of a minimum of three (3) recent previous clients in the area of website redesign and permission to contact them. For each reference, include the company name, contact name, contact phone number, the type of work done and the scope of the project.
7. The **forms attached** to this document must be included in the proposal as follows:
  - a. **Proposal Form in a separately sealed envelope** by phase and/or project component, including optional aspects of the proposal. Include all supplies, travel time, mileage and other costs associated with the project. Progress payments will be allowed at the conclusion of each phase over the term of the work.
  - b. **Non-Collusive Certification**
  - c. **Indemnification Agreement**

## **EVALUATION PROCESS**

The Clifton Park-Halfmoon Public Library Board will select the consultant(s) based on qualifications and the proposal which comes closest to matching all the requirements listed in this request for proposal and which in the Board's judgment provides the best value for the Library and the CPH community.

## **PROPOSAL REVIEW SCHEDULE**

Questions regarding the RFP will be accepted in writing via email [agutelius@sals.edu](mailto:agutelius@sals.edu) through 5:00 PM EST on Monday October 16, 2017.

Responses to question and any addenda will be posted on the Library's website [www.cphlibrary.org](http://www.cphlibrary.org) > About The Library > Board of Trustees > Website Redesign RFP by 5:00 PM EST on Monday October 23, 2017.

## **INTERVIEW**

Interviews shall be held by a subcommittee of Library staff and members of the CPH Library Board of Trustees. It is strongly recommended that the consultant's proposed manager, as the person with whom the Library Director will be dealing with most on the project, be the primary participant at the interview, but any and all key staff are also invited to participate. Interviews shall include a brief presentation by the consultant on their proposed approach to the project and will be followed by questions and answers.

## SUBMISSION DEADLINES / TENTATIVE PROJECT SCHEDULE

Library issues RFP	September 26, 2017
Deadline for written questions	October 16, 2017, 5:00pm EST
Library issues responses	October 23, 2017
Deadline for proposal submission	October 30, 2017 5:00pm EST
Consultant interviews	Early November 2017
Consultant Recommendation to Library Board	November 20, 2017
Anticipated Contract Start Date	End of November 2017
Launch	June 2018

NOTE: This timeline should be considered a draft. The Library reserves the right to deviate from this schedule.

**THE FORMS ON THE FOLLOWING PAGES MUST BE  
INCLUDED IN EACH PROPOSAL  
ONE PROPOSAL MUST BE MARKED ORIGINAL AND  
INCLUDE ALL ORIGINAL SIGNED FORMS**

**Clifton Park-Halfmoon Public Library  
Proposal Form (page 1 of 3)**

**Request for Proposal:**     Consultant Services: Website Redesign

**Proposal Due:**         **Monday, October 30, 2017 5:00 PM EST**

Clifton Park-Halfmoon Public Library  
Alexandra Gutelius  
475 Moe Road, Clifton Park, NY 12065

The undersigned respondent, having examined the specifications and other documents, hereby agrees to supply the product as per the attached specifications and to provide the service or perform other work stipulated in, required by and in accordance with the proposal documents attached for and in consideration of the proposed price, and certifies that it meets minimum Consultant qualifications.

The undersigned acknowledges receipt of addenda No(s) \_\_\_\_\_.  
*(Each addendum number must be listed separately.)*

**Please Submit:**         **Eight (8) complete copies of your proposal**

To be considered, all proposals must:

- \_\_\_\_\_ **Be signed**
- \_\_\_\_\_ **Include all forms and worksheets**
- \_\_\_\_\_ **Be received prior to the due date and time**

**Consultant Name:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Telephone:** \_\_\_\_\_ **Fax:** \_\_\_\_\_

**Principal Contact Name:** \_\_\_\_\_

**Principal Contact Email:** \_\_\_\_\_

**Clifton Park-Halfmoon Public Library  
Proposal Form (page 2 of 3)**

Consultants should break out the individual unit costs that make up the total cost proposal in the space provided below. Consultants should provide a total cost for each of the seven phases identified above. In addition, Consultants should provide costs for any other phases or project components recommended based on the Consultants experience in providing the required services.

Lump sum cost for basic proposal as recommended: \$ \_\_\_\_\_

Breakout of Phases and/or Components as recommended:

<u>Description</u>	<u>Cost</u>
<b>Phase 1: Discovery and Planning</b>	
_____	\$ _____
_____	\$ _____
_____	\$ _____
<b>Phase 2: Design and Approval</b>	
_____	\$ _____
_____	\$ _____
_____	\$ _____
<b>Phase 3: Development and Testing</b>	
_____	\$ _____
_____	\$ _____
_____	\$ _____
<b>Phase 4: Content Analysis and Generation</b>	
_____	\$ _____
_____	\$ _____
_____	\$ _____
<b>Phase 5: Final Review</b>	
_____	\$ _____
_____	\$ _____
_____	\$ _____

**Clifton Park-Halfmoon Public Library  
Proposal Form (page 3 of 3)**

**Phase 6: Launch**

	\$
	\$
	\$

**Phase 7: Post Launch Support**

	\$
	\$
	\$

**Optional alternate or additional components:**

<u>Description</u>	<u>Cost</u>
	\$
	\$
	\$
	\$
	\$

The undersigned, having examined the specifications, hereby agrees to supply the services and to perform other work stipulated in, required by and in accordance with the proposal documents for and in consideration of the proposed price. The price quoted will remain firm for a minimum period of ninety (90) days following the opening of the proposal.

**Authorized Representative Name:** \_\_\_\_\_

*(typed or printed)*

**Title:** \_\_\_\_\_

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**NOTE: By signing and submitting this Proposal for consideration by the Clifton Park-Halfmoon Public Library, the Consultant acknowledges that they have read, understand and agree to all aspects of the specifications as presented without reservation, exception or alteration.**

**Clifton Park-Halfmoon Public Library  
Non-Collusive Certification**

By submission of this RFP, each consultant and each person signing on behalf of any Consultant certifies, and in the case of a joint proposal, each party thereto certifies as to its own organization, under penalty of perjury, that to the best of knowledge and belief:

- 1) The prices in this proposal have been arrived at independently without collusion, consultation, communication, or agreement, for the purpose of restricting competition, as to any matter relating to such prices with any other consultant or with any competitor;
- 2) Unless otherwise required by law, the prices which have been quoted in this proposal have not been knowingly disclosed by the consultant prior to opening, directly or indirectly, to any other consultant or to any competitor; and
- 3) No attempt has been made or will be made by the consultant to induce any other person, partnership, or corporation to submit or not to submit a proposal for the purpose of restricting competition.

**Name of Firm:** \_\_\_\_\_  
Individual or Legal Name of Firm or Corporation

**Mailing Address:** \_\_\_\_\_

**City/State/Zip:** \_\_\_\_\_

**By:** \_\_\_\_\_  
Signature of Representative of Firm or Corporation (blue or other non-black ink)

**Dated:** \_\_\_\_\_



**Clifton Park-Halfmoon Public Library  
Indemnification Agreement**

The Consultant agrees:

(a) that except for the amount, if any, of damage contributed to, caused by or resulting from the negligence of the Clifton Park-Halfmoon Public Library, the Consultant agrees to indemnify and hold harmless the Clifton Park-Halfmoon Public Library, its officers, employees and agents from and against any and all liability, damage, claims, demands, costs, judgments, fees, attorney's fees or loss arising directly or indirectly out of the performance or failure to perform hereunder by the Consultant or third parties under the direction or control of the Consultant; and

(b) to provide defense for and defend, at its sole expense, any and all claims, demands or causes of action directly or indirectly arising out of the Agreement and to bear all other costs and expenses related thereto.

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**Authorized Signature**

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**Date**

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**Notary Public**

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