



*Veterans Living Legacy Project  
Alabama Veterans Register of Honor*

Request for Proposal

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## **1. Introduction**

### **1.1. Overview**

The American Village located in Montevallo, Alabama will be honoring our nation's veterans through a major project on its campus. This project was entrusted to The Citizenship Trust (CT) at The American Village by an act of The Legislature of Alabama, entitled The Veterans Living Legacy Act of 2008. The act requires The Citizenship Trust to report its initiatives and accomplishments annually to the Joint Legislative Oversight Committee on Alabama's Veteran Living Legacy (Section 16-44A-59), and to The Alabama Legislature, and to The Governor of Alabama.

The two main aspects of the Veterans Living Legacy Project (VLLP) are an online veteran's registry and the construction of a physical Veteran's Shrine onsite at The American Village. The initial focus of the endeavor and this RFP is to build a web based registry to collect targeted information on each veteran in order to publicly remember, respect, thank, and honor the United States veterans, living and dead, and any active members of the Armed Forces, especially those with ties to Alabama, and prominently to present their individual and collective names, biographical sketches, stories, videos, and photographs, thereby inspiring youth and general visitors to a lasting appreciation of their faithful service and heroic sacrifices for our nation and the cause of liberty.

Shelby County through its Department of IT Services is providing project support services to The Citizenship Trust and the American Village and plans to continue its strong partnership along with the existing information technology services.

### **1.2. Background**

The Citizenship Trust is national non-profit educational institution whose mission is to strengthen and renew the foundations of American liberty and self-government through educating and inspiring citizens, leaders, and stewards. The American Village opened on November 30, 1999, as Alabama's civic education center and now serves tens of thousands of students annually from across the Southeast.

The work of the American Village Citizenship Trust embraces three major goals:

- 1) Teaching youth America's legacy of liberty
- 2) Remembering the price of liberty
- 3) Cherishing the Constitution and America's Charters of Freedom

The Board of Trustees has adopted teaching goals reflecting the desire that young people:

...know America's history (the stories of how and why America is free);

...cherish the ideals of liberty (and how these ideals are enshrined in the Declaration of Independence, the Constitution, Bill of Rights, and the institutions of self-government); and

...serve our country as good citizens (by using the tools and habits of good citizenship as members of a free, self-governing Nation.)

The American Village is located in Montevallo Alabama in Shelby County. Shelby County is the fastest growing county in the State of Alabama, encompassing approximately 808 square miles in Central Alabama. Shelby County presently has an estimated 171,465 residents and projections are that by 2015 there will be 216,308 people living in Shelby County.

### 1.3. General Goals and Objectives

The goal of VLLP is to provide an online registry that will afford both veterans and their families the opportunity to “*tell the stories*” of their service and exhibit that information. The design of the website and display of information will be in a manner that is inspiring and dignified yet innovative with the latest multi-media technologies and geospatial referencing.

The site should provide easy access to the registry, be adaptable to current and changing technology, provide content management capabilities for staff, multi-stage approval workflows for all content in the registry, site search capabilities, registry search capabilities, interactive maps, and static text.

This RFP is solely focused on the development of the online veteran's registry. However, some data elements of the registry and the underlying database scheme will eventually be utilized for local kiosk/display usage at the Veterans Shrine to be built onsite at The American Village. The content presentation at The American Village will be significantly more robust in scope and content than the online registry. This is noted as some requirements contained within this RFP involve the collection and storage of data that may not be utilized in the online registry in its entirety.

### 1.4. Partnering Principles

CT believes the general partnering principles below are essential to successful technology relationships. These principles are incorporated into all contractual relationships regarding strategic applications.

#### **PARTNERING PRINCIPLE #1 COMMITMENT TO STATE-OF-THE-ART PRODUCTS**

CT will be making a significant intellectual capital and resource investment in Vendor's products. Vendor historically has made and, within reasonable fiscal constraints is expected to continue to make, investments in the ongoing development of its products, including the Software.

#### **PARTNERING PRINCIPLE #2 PREDICTABILITY OF ON-GOING COSTS AND EXPENSES**

Costs and expenses must be clearly articulated and understood by the Parties prior to executing contractual agreements or change orders.

#### **PARTNERING PRINCIPLE #3 DECISION-MAKING AUTHORITY**

Each Party will commit knowledgeable and empowered managers and other key decision-makers to cultivate and support the relationship created through the Agreement.

#### **PARTNERING PRINCIPLE #4 TIME-TO-MARKET SOLUTIONS AND REGULATORY UPDATES**

In a long-term technology relationship, time-to-market for products is critical to CT and Shelby County. Vendor will work with CT and Shelby County to facilitate timely deployment of Vendor's products.

#### **PARTNERING PRINCIPLE #5 REALIZING EXPECTED AND FUTURE BENEFITS**

Vendor will work with CT to identify and set forth in contractual agreements quantifiable, measurable benefits associated with deploying and using Vendor's products.

**PARTNERING PRINCIPLE #6 PROTECTION OF INVESTMENT**

Vendor will work with CT and Shelby County to ensure investments in Vendor's products are protected economically against shifts in platforms and product migrations.

**PARTNERING PRINCIPLE #7 MANAGEMENT PARTICIPATION**

Vendor will make appropriate opportunities available to CT and Shelby County to become involved in Vendor's technology strategic planning process. On-going representation and/or observation on appropriate customer councils and committees related to Vendor products also will be made available to CT.

**PARTNERING PRINCIPLE #8 QUALITY RESOURCES TO SUPPORT THE RELATIONSHIP**

Vendor will commit quality and support resources and systems to support their relationship. You manage what you measure.

**PARTNERING PRINCIPLE #9 GROWTH OPPORTUNITIES**

Vendor must be flexible in addressing CT and the VLLP's future growth.

**PARTNERING PRINCIPLE #10 COMMITMENT TO OPEN ARCHITECTURE ENVIRONMENT**

Vendor has adopted and intends to continue to promote open architecture solutions. Vendor will make available to CT and Shelby County all application programming interfaces and other Interfaces and related documentation to promote interoperability among Vendor's system and CT's other systems to the same extent that like items are made available by Vendor to its other customers.

**PARTNERING PRINCIPLE #11 ALIGNMENT OF ACCOUNTABILITY/RESPONSIBILITY**

Accountability and responsibility will be aligned to facilitate decision making, accountability and a results-focused orientation.

## 2. Project Scope

### 2.1. Approach

CT is seeking the services of an experienced website design firm with strong knowledge in Microsoft SharePoint 2010, Silverlight, .NET, and other similar Microsoft platforms to design, develop, and implement an interactive website registry titled "Veterans Legacy Honor Registry". This registry will be designed as a public repository for the collection of background information on American military veterans.

The registry will afford both veterans and their families the opportunity to "*tell the stories*" of their service and exhibit that information. After registration, individuals will be able to add this information directly to the registry via the internet. Individuals will be able to create a "*Page of Honor*" for his or herself or create pages for any eligible family member or friend whom they wish to add to the registry. Access to view entries will be available to anyone. However, only individuals who have created a "*Page of Honor*" will have the ability to change, delete or edit their entries through the use of a secured password. This will allow for the permanent preservation of the entries/stories and allow the sharing of this with all Alabamians for succeeding generations.

The registry will link to the existing website of The [American Village](#) and to other websites of consenting appropriate military service organizations as approved by VLLP. In addition, other sections of the website will be added to the registry that identify the locations of memorials, monuments, military museums, military parks, historic sites, etc. that are located in Alabama which are of interest or significance to our military veterans. The criteria for inclusion in the Registry will be open to the following persons:

***“Those who have served honorably under the flag of The United States at any time since April 19, 1775, with any branch of the military including active military personnel, Reserves, National Guard, Merchant Marine, Army Air Corp, WAC, WAVS.”***

There will be a primary emphasis upon including veterans who have some connection to the State of Alabama or to its predecessor territories. This may be established by either having been a resident of Alabama at some time, or by subsequent burial in the State of Alabama, or having been a veteran whose descendants reside in the State of Alabama at the time of providing information to the registry. However, no restrictions will apply that would have the effect of eliminating veterans from any other jurisdiction who meet the criteria and who wish to be added to the registry.

## **2.2. Technology Scope**

The registry technology platform should be constructed in SharePoint 2010 technologies with the use of SQL Server 2008 spatial tools. The SharePoint platform was selected due to the considerable in house support resources/investment into this architecture and the native connectivity/ collaboration elements associated within a Microsoft based client/server shop. A detailed requirements/technology description is available in Appendix A.

## **3. Vendor Qualifications**

### **3.1. General Information**

Each vendor shall give a brief background and history of its company, including the following:

- Corporate vision
- Services and Support vision and applicability to VLLP
- VLLP is seeking a development partner with deep SharePoint skills. Specifically, CT is seeking:

- ✓ Minimum of three years of experience working with SharePoint Server development, implementation and design.
- ✓ Minimum of three similar projects that demonstrate experience in an organization that successfully implemented or started a SharePoint Server development project.
- ✓ Solid project management and team leadership skills

CT further desires employees of the SharePoint implementation partner to have the following or similar certifications:

- ✓ Microsoft SharePoint Server Deployment Planning
- ✓ Microsoft Gold Certified Partner with Information Worker Competency
- ✓ SharePoint Server Portals and Collaboration
- ✓ Microsoft Certified Systems Engineers
- ✓ SharePoint Server Certified Microsoft Certified Technology Specialists

### **3.2. Financial Data**

Each vendor shall provide the following financial data:

- A copy of a credit rating report from any of the major credit rating agencies, Dun & Bradstreet, Moody's, Standard & Poor's, etc. OR
- Last 3 years of audited Key Financial Reports (Income Statements, Balance Sheet, etc.)

### 3.4. References

Provide at least three (3) references in the following format:

- Institution name
- Date contract was signed
- Date Implementation was completed
- Background of the project
- Modules Implemented
- Scale (budget and people assigned to project)
- Brief explanation of why this reference is relevant to VLLP/CT
- Reference Contact Name
- Reference Contact Title and Role in Implementation
- Contact Information, preferably address, telephone and email

## 4. Instructions, Requirements

This RFP is only available in electronic PDF format. CT/VLLP will review all responses and supporting documentation to this RFP and, if necessary, gather or solicit additional information that may be required to fulfill the purpose and expected outcomes contained in this document. Responding to this RFP is not mandatory.

### 4.1. Submission of Responses; Handling of Vendor Inquiries

Vendors must respond to this Request for Information by close of business on **September 19, 2011**. Responses should be submitted in Adobe PDF format via email to:

Phil Burns  
CIO - Shelby County Alabama  
102 Depot Street  
Columbiana, Alabama 35051-1118  
205.670.6999  
pburns@shelbyal.com

We may request respondents to present oral and/or provide demonstrations of the information contained in their response to this RFP.

### 4.2. Proposal Format

Respondents are requested to adhere to the following format:

1. Cover Letter – Include an overview of your organization and rationale why you feel your organization is a good fit for this project and a viable partner for the CT.
2. Approach to Project – Discuss how you would approach this project and provide, as applicable, any comments on VLLP's proposed plan. CT encourages respondents to submit proposals that include innovative methods and/or tasks that highlight their unique value. However, this should not be construed as an encouragement to not follow established and best practices. Include an identification of major project risks and mitigation strategies.
3. Qualifications/References/Content – See Section 3 & 4.3 for required elements.
4. Proposed Team – Provide expected team composition including team member bio-data. Note: Proposed staffing is a significant factor in respondent selection. As such, no changes in key staff or changes in roles/responsibilities can be made without the written agreement of the CT project manager and the Shelby County Department of IT Services.
5. Cost – Provide estimated cost breakdown - See Section 4.3 for requirements.

### 4.3. Proposal Content

- A. The proposal should include resumes of all principals to be involved in the project and their roles and responsibilities for the proposed project.
- B. Proposal should be all encompassing, with a single vendor identified as the “responsible lead vendor.” Please indicate any needed subcontracted services required to meet the needs of the proposal or clearly indicate what portion of the services are not included as part of your proposal.
- C. The proposal should include an estimated project timeline for completion of each phase of the project. This should be as realistic as possible since this will be part of the contractual agreement.
- D. A detailed work plan describing your approach to designing, managing, and coordinating this project. The description should include all tasks listed in the scope of work for all phases of the project and tentative schedule.
- E. The proposal should include a detailed cost breakdown for the proposed registry solution. The proposal should contain the total project cost, as well as detailed “line item” costs for components/phases of the project. All hourly rates and fees, charges, costs, and anticipated reimbursable costs must be clearly stated. The proposal should also include pricing information for maintenance services for at least 3 years following implementation. The vendor should submit proposals with individual unit prices reflected on all software options and/or optional components. Professional services, software and other expense items should be separate from any hardware components. Annual maintenance cost should be included within proposal submission.
- F. Collection of information. Please state how you intent to gather all the required information, format preferred and assistance expected from CT in order to complete this project.
- G. Years of experience related to website design. Provide a list of comparable websites designed by your firm. Include the website address, company/agency contact person, address, telephone number, and hard copies of the home pages. These companies/agencies may be contacted for references.
- H. Enclose a section on relevant website development experience and information on the extent of your firm’s abilities to meet the needs of this project. Please provide a sample of what you envision as the home page of the site and a sample honor page.
- I. The Citizenship Trust (CT) at American Village is a 501c (3) non-profit organization. Please indicate any amounts, either dollar values, hours, or equipment, your entity is willing to donate toward the completion of this project. Donations will not guarantee a firms selection for this project and are not a requirement of this RFP.

### 4.4. Timeframes for RFP Process

The timeframes for the evaluation process will be as follows:

- ✓ Distribute RFP on **August 15, 2011**
- ✓ Receive Proposals from Vendors by COB **September 19, 2011**
- ✓ Submit Proposals to Phil Burns

#### **4.5. Incorporation of Vendor Proposal**

The proposal submitted by the successful vendor, together with the representations made by the successful vendor, shall be incorporated into a Master Technology Agreement between CT and the successful vendor. In the event of a conflict between the terms of the successful vendor's proposal and this RFP or the terms of another document relating to this RFP, the order of precedence set forth in the Master Technology Agreement shall apply.

#### **4.6. Evaluation and Selection Criteria**

The CT shall review and evaluate all proposals. Evaluation of responses will be based, in part, on the following criteria:

- A. Qualifications of respondent, including:
  - Demonstrated competence and professional qualifications necessary for successfully performing the work required by CT and Shelby County Department of IT Services as stated in the RFP.
  - Recent experience in successfully performing similar services, and the backgrounds and experience of the specific individuals to be assigned to this project.
  - Project financial cost to develop and ongoing support costs.
  - Experience in making a website innovative, interactive, user friendly, informative, and attractive to the website user.
  - Experience in content management website construction. Preference will be given to respondents who have developed successful websites for other agencies similar in nature to this project and similar entities to CT.
  - Demonstrated creativity in website development.
- B. Commitment to work with CT and Shelby County in addressing current and future needs with respect to website development, content, equipment and service requirements of the website.
- C. Understanding of the work required by VLLP and completeness of response
- D. Value/Benefit of the Respondent's proposal.
- E. Proposed approach in completing the work.

#### **4.7. Confidential Information**

The CT and the VLLP project receive public funds and as such are subject to the Alabama Public Records Laws. Vendor responses are not public documents until a contract is awarded. After a contract is awarded, if CT receives a public records request pursuant to this statute for the vendors' proposals or other information relating to this RFP, it is required by law to disclose such information unless such information meets the definition of a "trade secret". A "trade secret" is typically defined as "business or technical information, including but not limited to a formula, pattern, program, device, compilation of information, method, technique, or process that: (a) derives independent actual or potential commercial value from not being generally known or readily ascertainable through independent development or reverse engineering by persons who can obtain economic value from its disclosure or use; and (b) is the subject of efforts that are reasonable under the circumstances to maintain its secrecy." The vendor disclosing such trade secret must clearly mark such information "Confidential" in order for CT to assert

that it is a protected trade secret and not a public record if it receives a public records request.

#### **4.8. Principals**

Citizenship Trust / American Village Lead Personnel  
Tom Walker, President

Shelby County, Alabama  
Alex Dudchock, County Manager  
Phil Burns, CIO & Manager of IT Services

### **5. Legal Requirements**

#### **5.1. Overview**

CT wants to memorialize its arrangement with the successful vendor with a contract that fully and accurately captures the various commitments being made by vendor. CT plans to use a Master Technology Agreement, or "MTA" to establish the contractual relationship with the successful vendor. The MTA will be structured as a master agreement to afford CT and Shelby County Department of IT Services the flexibility to acquire additional products and services in the future without the need to renegotiate the base agreement. CT is mindful that the MTA will need to be tailored to take into consideration technical and functional aspects of a vendor's solution; however, the core approach and basic terms and conditions contained in the contract are not expected to change.

#### **5.2. Use of Legal Counsel**

CT will use legal counsel to develop the MTA and may be using legal counsel to assist it in reviewing the vendors' responses. Because a legal review of each vendor's response may be undertaken by CT in determining the likelihood of securing a contract with such vendor, CT and Shelby County strongly recommends that each vendor involve its legal counsel as well.