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LORI grant documents

Rhode Island Digital Portal

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HELIN Library Consortium LORI Grant Statewide Digital Repository Project for Rhode Island -- New Commons Consulting Proposal

New Commons

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Recommended Citation

LORI Grant Consulting Proposal Narrative

New Commons and Reckoner Group

HELIN and its partners plan to submit for an implementation grant for a Statewide Digital Repository in early 2015. Assuming award notification is June 2015, and grant authorization on October 2015, there is a long time before anything happens. Momentum and opportunities would be lost.

The repository Planning Committee is of a mind to keep the planning process moving forward from now until the accepted award. It concluded that tangible progress can be made to create implementation-grant oriented outputs such as:
- Develop a prototype of the repository platform/website
- Identify the best practices in existing repositories in other states
- Engage several topical working groups to begin working on a proposal for a statewide digital repository grant
- Conduct targeted surveys and questionnaires
- Draft the stakeholder use cases (can be extracted from the notes from the forum last June)
- Do a scalable repository pilot with an operation digital repository platform
- Create a proposal for an implementation grant

Tasks to Complete
To keep the process moving and create tangible outputs like those just listed (such outputs will be useful to include in a final proposal), New Commons and the Reckoner Group would provide professional services to support the repository work group and its members to complete five tasks. Given the small amount of financial resources available completing the 5 tasks will require lots of volunteer contributions from our working groups.

Task #1: Project Management
New Commons would serve as the project and communications manager to keep all of the professional and volunteer contributions aligned. This would include developing a project management plan for mobilizing volunteer resources of the working group as well as other stakeholders. A timeline for submission of an implementation grant would be prepared. An online work room would be used by the work group and invite comments from others in the RI digital repository community. Further, New Commons would serve as the communications manager to keep all repository interested parties regularly informed of progress.

Task #2: Prepare the Proposal Using the Working Groups
We would use the repository design as the foundation for an implementation grant proposal. Instead of hiring a grant writer, unknown to the work of the repository or the players involved in its creation, the proposal content would come from members of the working groups and others. Robert Leaver would facilitate meetings of the working groups to extract the proposal content required.

Task #3: Develop Prototype and Website
Overview
HELIN, New Commons and the Reckoner Group has recognized the need for an enhanced online solution in the form of a digital repository to facilitate ease of access to key information,

archives, and general information related to Rhode Island including the key institutions and existing digital archives that are based here.

As an early step in building such a robust and intricate system, it is our recommendation to start with a minimum viable prototype that can be used to help flesh out ideas, and create a visual blueprint for the look and feel for the repository, focusing on user interface design to create the best user experience possible. Furthermore such a prototype will make it easier to secure funding for the development and launch of the full repository. Creating the prototype will significantly enhance the competitiveness of the IMLS implementation proposal.

Prototype components include the following:
- Brand identity
- Creating a three (3) month calendar that identifies milestones, tactics, and responsibilities associated with the development and execution of HELIN's repository prototype.
- Website strategy and information architecture as it relates to user interface
- Design and development of the website prototype

Agile Process[1]
Reckoner Group will continue to work with HELIN and New Commons to develop and execute an evolving strategy using agile development, domain-driven design, using a lean startup process and fail fast tests. Reckoner Group will build a website prototype and then will continue to add functionality and complexity in subsequent phases, refining components and interfaces over time as further capital resources are committed. Using an agile* process, time and cost savings are provided to HELIN and additional sponsors by building the minimum viable product and bringing it to market. Users' feedback on website improvements is gathered, analyzed and used to inform decisions related to website evolution. The result of this agile process is an elegant website solution that is in line with the need and understanding of the target audience.

Branding, Design, Development

As Reckoner Group works with the group to refine this scope and modify inclusions as they relate to the following three (3) areas (see appendix for details):
a) Brand development: name, url, identity, (*additional branding components such as style guidelines, core values, etc. may be included in this prototype development or may be reserved for later stages of development*)
b) User Interface Design
c) Development and deployment of the website prototype

Task 4: Engage the Community
New Commons would design and facilitate a community briefing to present the draft repository design for feedback.

The briefing would have 2 purposes: (1) Inform the community of what has been done since last year, what is coming next and to get feedback. (2) Share draft stakeholder use cases and sharpen them.

Appendix for Reckoner Group Details and Deliverables

3a Branding
Reckoner Group will provide guidance in the process of selecting a name/url. Reckoner Group will then design the logo identity, and document the core values and style guidelines. This work will run in parallel while web site components are being developed.

Details and deliverables are discussed below.

Task	Description	Responsible
Core Values	Reckoner Group with work with HELIN to define guiding principles that will inform the brand strategy, design process and will influence web content and all public facing materials that are part of the brand.	Reckoner Group HELIN New Commons
Name Generation	Reckoner Group will work with HELIN to generate name ideas with relevant available urls. Final name selection to be decided by consensus of Reckoner Group, HELIN and New Commons.	Reckoner Group HELIN New Commons
Identity Design	After name is selected, Reckoner Group will present examples of relevant logos and successful brands. Reckoner Group will take input from HELIN to inform the design of up to four (4) rounds of logo sketches. HELIN will select two (2) logo concepts to be further refined; then HELIN will selecting one (1) logo concept to be perfected as the final logo design.	Reckoner Group HELIN New Commons
Style Guidelines	Reckoner Group will document the proper use of the font, provide other versions of the logo for other uses, describe use of fonts, and inform proper use of other visual elements.	Reckoner Group HELIN
Brand Messaging Strategy	Reckoner Group will work with HELIN to develop the messaging strategy for the brand, which will inform the themes, navigation and content of the website and related marketing materials. (*Development of marketing materials is not part of this scope of work*)	Reckoner Group HELIN
Final Review and Acceptance	HELIN will provide formal acceptance of the final logo/identity design.	Reckoner Group HELIN

3b. Website Design and Development
As part of this engagement, Reckoner Group will provide the following additional design services for HELIN:

- Design look and feel, user experience and interface for the website

Details and deliverables are discussed below.

Task	Description	Responsible
Creative Brief	Following the Visual Design Session (see below), the Reckoner Group visual designer will provide an in-depth Creative Brief to summarize design findings, recommendations, and feedback from the Visual Design Session process.	Reckoner Group HELIN
Interactive Design - Discovery Sessions	Reckoner Group and HELIN will hold up to three (3) remote meetings to discuss design goals and objectives to determine the direction of the website design. The following characteristics will be considered and reviewed during discovery: • Branding; identity, messaging strategy • Visual design preferences (*Style examples to be gathered by Reckoner Group and presented to HELIN in the first design session*) • Existing style guide and color palette (*To be developed by Reckoner Group*) • HELIN supplied images and other digital assets • Website usability best practices • Information architecture	Reckoner Group HELIN
Interactive Design - Concept Production	Reckoner Group will produce website look and feel design concept(s) in the form of static mock ups, in accordance with the functional deliverables described in Section 3a. These static images will begin with the home page layout. Once the HELIN gives approval for this we will design 2 internal page layouts before proceeding to coding the site. HELIN will be allowed up to four (4) rounds of revisions. If additional revisions or page designs are requested, a time and materials change order will be required.	Reckoner Group
Interactive Design -	Reckoner Group and HELIN will review the design	Reckoner

Task	Description	Responsible
Visual Review	concept(s), noting any changes requested by HELIN.	Group HELIN
Interactive Design - Revisions	Reckoner Group will revise the design concept based on the results of the design review.	Reckoner Group
Final Review and Acceptance of Design	HELIN will provide formal acceptance of the prototype design.	HELIN
Content	HELIN will provide content for website	HELIN
Development/Coding	Reckoner Group will execute coding for responsive website prototype.	Reckoner Group
Prototype Review	HELIN will review prototype and submit revisions to Reckoner Group, HELIN will be allowed up to three (3) rounds of revisions.	Reckoner Group HELIN
Deploy	Reckoner Group will test and launch prototype.	Reckoner Group

3c. Website Deployment
Reckoner Group and HELIN will review the final site to demonstrate that it meets the approved visual, functional, and technical requirements. HELIN will provide formal acceptance of deliverables to Reckoner Group. At which point Reckoner Group will launch the website prototype. Reckoner Group will provide HELIN with regular check-ins as well as consulting and design support, to facilitate additional design and development of further functionality following agile development practices.

LORI Grant Budget

New Commons, Inc. / Reckoner Group

	Senior Consultant Robert Leaver		Consultant Reckoner		Administrative Support		Technical Expenses	Total
	# days	**total**	**#days**	**total**	**#days**	**total**		
Task 1: Project Management	0.375	$675		$0	1.75	$875		$1,550
Task 2: Use Workings Group to Prepare the Proposal	1	$1,800		$0	0.75	$375		$2,175
Task 3: Prototype / Website	0.125	$225	6.25	$5,000		$0		$5,225
Task 4: Engage the Community	0.5	$900		$0	0.25	$125		$1,025
Totals	**2**	**$3,600**	**6.25**	**$5,000**	**0.25**	**$1,375**	**$0**	**$9,975**

Senior Consultant	$1,800	/day
Reckoner	$800	/day
Administrative	$500	/day
Visualizer	$600	/day
Technical	Per task	