Request for Tender (RFT)

CMS redevelopment and redesign of the NUJ website
(www.nuj.org.uk)

Prepared for the National Union of Journalists by

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Introduction

The NUJ website needs redevelopment. The current website was launched in August 2013 and made responsive in October 2014. The design has dated and needs a fresh look and feel.

The NUJ is looking for tender proposals from agencies with CMS developers who can upgrade the current Netxtra system or replace it with a new CMS and can design an innovative and attractive new website for the union.

The NUJ is planning to upgrade its ThankQ CRM from locally hosted version 8 to the cloud based v10. This will require changes to the online joining form and member portal section of the website.

The NUJ hopes to redevelop both systems simultaneously to take full advantage of the integration possibilities between the technologies. Any agency seeking to redevelop the CMS will be expected to work closely with The Access Group who will be upgrading the CRM.

The NUJ's functionality requirements from an integrated CRM/CMS suite are detailed below. The NUJ's preferred project path is also described below.

This request for tender (RFT) also details the current technology in place.

The NUJ hopes to appoint a development partner from responses to this RFT.

Developers who wish to express an interest in this project are asked to provide the NUJ with:

1. A development proposal for a CMS solution to the requirements detailed below.
2. An estimation of cost and time-frame, broken down by the sections in this document.
3. Initial design ideas.
4. Examples of previous work and recommendations from former clients, where available.

Responses should be sent by 12:00 on **26 October 2017**. The NUJ will follow up with requests for a meeting with preferred respondents to expand on their proposals.

Contacts

Any questions about this RFT and the related project can be addressed to:

Donnacha DeLong, Autonomy Consulting

e: info@autonomyconsulting.info, ph: 077 66797151.

Interested developers should send their RFT response to:

Michelle Stanistreet, General Secretary, the NUJ

e: generalsecretary@nuj.org.uk

Introduction to the organisation

The NUJ is a trade union representing over 26,000 members working in the media. The union represents a broad range of media professionals across seven sectors:

- newspapers and agencies
- new media
- freelance
- broadcasting
- magazines
- books
- PR and communications.

The NUJ is the largest union for journalists and media workers in the UK and Ireland. The union is organised in large organisations including the BBC, ITN, RTÉ, The Guardian, The Irish Times, as well as smaller publications across both countries. The union also organises freelance journalists, who make up almost one-third of membership.

Equality stats

Women make nearly 40% of the NUJ's overall membership (and over 40% of the NUJ's paying membership). Nearly 40% of the NUJ's membership is under the age of 45. Just over 14% of the union's membership defines themselves as other than white British or Irish.

Structure

The basic unit of NUJ organisation is the workplace chapel, one or more per organisation (depending on the size). Chapels are open to staff and freelances who regularly work for the same employer. Many freelance members who work for multiple employers are not members of a chapel. NUJ members working for a particularly company will not necessarily be organised into a chapel.

All NUJ members are in a branch. Branches are normally organised on a geographic basis and open to all members regardless of employer. In areas where there is a large concentration of members, there are more than one branch partially organised by sectors (e.g. freelance, magazines, book publishing, etc. in locations including London, Dublin, Glasgow, Edinburgh). There are also workplace branches for large chapels such as the BBC, Guardian and Financial Times. There are three branches outside of the UK and Ireland – Paris, Brussels and the Netherlands.

In England, the NUJ has a council for each sector with members elected by geography or workplace or equality group (see below). Ireland, Scotland and Wales have executive councils that cover all sectors. The National Executive Council is the main supervisory body of the union, with representative members elected by sector or geography or equality group.

The union also has three equality councils. The Black members council represents, and is made up of, members who define themselves as Black. The disabled members council represents, and is made up of, members who define themselves as disabled. The Equality council is open to all members, as well as the equality representatives from other councils.

Requirements

All data and sharing must be highly secure and GDPR compliant.

Website look and feel

The NUJ is a union with members who, increasingly, write or produce content for websites. The NUJ website should be contemporary and attractive, particularly to the new generation of journalists the union seeks to organise.

The design needs to be fully responsive and adaptive to the full range of mobile and tablet devices. User pathways and signposting can be improved. The site's Search Engine Optimisation should also be improved, including the introduction of semantic web tagging.

Comprehensive search should allow site users to sort by date and relevance as well as filter by category/content type.

The online joining process needs to be improved – fully integrated with the rest of the website, made more accessible and usable. The possibility of a two-stage process – registering interest and later fully applying – to be considered. The process needs to capture all GDPR permissions and agreements.

The range of payment options needs to be expanded beyond the current credit card/direct debit options to include newer options.

A "Refer a friend" option – allowing applicants to invite their colleagues to join – should be added at the end (referrer name optional).

Current functionality such as password-secured members only pages must be maintained. A new integrated members area must include allowing members to see and amend all personal and employment information held by the union.

The contact details section should include the option to be contacted by newer technologies such as WhatsApp (and allow the easy addition of future technologies).

Members should be able to easily submit changes of status – staff/freelance, maternity leave, unemployed, long-term sickness – and see their chapel, branch and sector with the ability to propose changes to the membership department for approval.

There should be a media library (downloadable documents, images, video and audio files) with images, searchability and front-end categories.

The system should use cookies to maintain soft login for members' only pages/media, but maintain secure login for personal data.

Personalised messaging on the website should be possible to members based on information in CRM (targeted events, messages related to anniversaries, risk of lapsing, etc).

The contacts area should contain a contact form that is personalised for logged in members (highlighting relevant sector, branch and chapel contacts), as well as an FAQ section to direct them to the correct person.

Private forums for defined groups of people (CRM linked) and closed spaces for online meetings, potentially integrated with Skype, should be available on the site.

The site should host petitions, with sections auto filled for logged in members, and capture data from responders (record in member data in CRM, capture non-member data to create lists of supporters and potential members).

Easily editable templates for posters and leaflets should be made available. The possibilities of editing these templates online should be investigated.

CMS

Editors will need templates for pages, news, events, campaigns and media resources with more flexibility in constructing each content type. The ability to easily expire content and images so that they're available in the CMS, but not on website, is also a requirement.

"Accordion" structures are necessary for FAQs and other long pages. The system should allow the easy use of embed scripts, but also restrict their usage to approved CMS users.

The automatic transfer of the news archive is an essential part of the new build. Tags and categories must also be captured.

A single image resource is needed for editors, with meta data capturing and addition of caption, copyright (consider use of Cloudinary or similar for responsive image management) (NOTE: the current CMS stores editorial images in two different ways).

A form builder that can replicate complex NUJ forms (NUJ Extra, legal surgery, expenses) is required, with CRM integration to autofill sections for logged-in users.

The CMS should allow the creation of surveys by staff as well as chapel/branch reps who can restrict respondents to chapel/branch members. It should allow members to submit events and invite groups of relevant members (e.g. branch, sector, location) [with approval layer].

Basic CRM/CMS integration

As the CRM will be rebuilt at the same time as the CMS is being developed, this will afford the developers of both to work together to ensure seamless integration between the two systems using APIs.

An efficient push and pull between the two systems will need to be developed to ensure the website works to user expectation as much as possible.

There are a series of fundamental requirements to this integration, with more complicated integration outlined in the **specific projects** section below.

Once a member logs into the website, the CMS should hold enough information about them to allow easy update of the details the union holds and to autofill a range of forms.

Event booking is a key area, members should be able to book places on events without having to fill in all their details. All attendees, members and non-members, should be able to pay for events where relevant.

The CRM should record event bookings and attendance in user record and the CMS show bookings to users in members' area.

Members should see the relevant officials and representatives according to their membership details when they log in.

The CMS should pull branch official/council/committee membership and contact information (based on member preferences) from the CRM for publication on site.

Email newsletters should be easy to create in the CMS, integrated with the CRM and bulk mailer. Branch officers, members of NEC and other Councils/ Committees should be able to create and distribute newsletters or add elements to particular audiences in general output [with approval layer and restrictions in election periods].

Email templates should be created In the CMS that are automatically send to members on anniversaries of membership or for important communications (subscriptions fail, initial unemployed time completed, temporary membership expiring). Branches/chapels should be able to tailor these emails to their audience.

Branches should be able to nominate for elections online and the nominations should be checked against membership data to confirm eligibility (see Delegate Meetings below). Nominated persons should be able to approve the nominations online.

Secure online voting for non-statutory elections/consultative ballots should be possible on the website, with constituency defined by CRM data.

Specific projects

Lay representatives' access

The union wants to provide members with defined responsibility access to information held in the CRM. For example, chapel reps should be able to access information about their chapel membership (including applications and members in arrears).

Data protection and security is a primary concern in this area.

Some potential functionality of this development:

- Allow approved officers (chapel, branch, council) access to information about their membership/constituency.
- Allow chapel/branch officers to see membership list highlighting new applicants and members in arrears.
- Allow chapel/branch reps to contact members securely through the system and to send updates to membership on changes (members who have joined or left workplace).
- Allow chapel/branch officers to amend lapsing message sent to members in arrears (with approval by staff).

Freelance Fees Guide

The NUJ wants to replicate the information contained within the current Freelance Fees Guide (http://www.londonfreelance.org/feesguide/) on the main NUJ website with major improvements to the look, usability and accessibility of the data.

The list of fees in the guide is based on user submissions of payment they have received. The site current contains a Rate for the Job form for user submissions.

Members directory

The NUJ wants to replace the NUJ Freelance Directory (http://www.freelancedirectory.org/) with a full members directory hosted on the main NUJ site.

The proposed directory will have to have an approval layer (perhaps including reps as well as staff) and will need to be rolled out at a manageable rate.

- Allow the creation of a directory of members, partially publicly accessible.
- Allow members to choose what information to publish about themselves: 1. to other members, 2. publicly.
- Allow members, particularly freelance members, to include public self-description, personal website link to advertise for work.

- Allow members to identify themselves to other members as mentors, recruitment advisers, volunteer reps if they have been approved to act as such (information stored in CRM).
- Allow members to block/report other members for misuse of the directory.

Delegate meeting

The NUJ delegate meeting (DM) is the largest single activity in the NUJ's calendar. It happens every two years, the next will be in April 2020.

Appendix 1 outlines the full complexity of the DM operation. The NUJ would like to move as much of this online as possible, including:

- Motion submission, confirmation, amendments.
- Delegate nomination and online booking forms for delegates.
- Nominations for DM elected posts.
- Easy output of content for use in print publications of preliminary and final agenda.
- Ability to "select" motions and identify "covered motions".
- Ability to create online order papers.
- Ability to create composite motions.
- Delegate attendance and substitutions.
- Online version of the agenda that can be updated during the DM (identifying when motions are passed, defeated, remitted or have fallen).
- Expenses.

Project outline

The NUJ wants respondents to consider planning this work in a number of phases. Agile methodology offers an appropriate way to address this.

A minimum viable product in this project would consist of a redesigned website with all the functionality described above in relation to the CMS and basic integration. That could be launched while work continues on the above defined **specific projects**.

The union requires respondents to consider the project in this way when preparing timeframe and cost estimates, allowing flexibility in the project and the budget allocation.

There is no strict deadline for completion of all or part of this work. The union is keen to develop a realistic timeframe and achievable goals with the chosen development partner. The parallel work on the CRM means that effective project coordination is essential to ensure the work is done within budget.

Current technology

CMS

- NetXtra CMS v2.4.11
- Xanadu Tags v1.4.4.
- Template Tags v1.2.2
- Hosted by NetXtra

CRM

- Access ThankQ version 8.5.008
- Windows Server 2008 R2
- SQL Server 2008
- Hosted in-house

Office Software

- MS Office 365 being rolled out, including planned SharePoint Intranet.

Finance Software

- PS Financials
- Version PSFCLoud
- Cloud hosted by PS Financials.
- Not connected to CRM

The Delegate Meeting

The NUJ Delegate Meeting (DM) takes place every two years. The next DM will be in April 2020. Preparing and running the DM is a complicated and multi-layered process.

Motions

Every branch in the union, as well as NUJ councils and group chapels (representatives of a number of chapels working for the same company), can submit motions to the DM. The deadline for receipt of motions is not later than 17 weeks before.

A provisional agenda containing the draft motions is then distributed to the proposing bodies not later than 14 weeks before. Tabling bodies must confirm their motions. All tabling bodies can also submit amendments to any motion. Confirmations and amendments must be received not later than eight weeks before the start.

Some motions will have been "selected" and some "covered". This means that, unless a tabling body specifically chooses to confirm, or any table body amends, a covered motion, only the selected motions will appear on the final agenda.

The final agenda must be distributed to tabling bodies not later than five weeks before.

The standing orders committee (SOC) will then start to lay out the order papers and begin to draft composite motions. This work continues during the DM itself.

Late notice motions and subsequent amendments, as well as emergency motions, may also be tabled during the period of the DM.

During the DM itself, motions are debated and will be passed, defeated, withdraw or remitted, or may fall due to a lack of proposer. Order papers may run out of time, meaning that the rest of the order paper will be taken when there is time in the agenda. If DM finishes without all motions being debated, the leftover motions are remitted to the NEC.

Elections

A number of NUJ bodies and delegations are elected at DM, these normally include the appeals tribunal, the disabled members' council, the equality council, the standing orders committee, 60+ Council and the union delegation to TUC Congresses.

Nominations to these elections must be submitted at the same time as motions to the DM (not later than 17 weeks before).

Attendance

Delegates to the DM include branch delegates (the number based on overall branch membership), group chapel delegates, all members of the NEC and SOC and representatives of other NUJ bodies.

Delegations are normally made six months before the DM, but substitutions are usually permitted up to the opening of the DM.

Attendance numbers, including number of branches and other bodies represented, gender, ethnicity, age and disabled members' numbers are reported at the end of the DM.

Expenses

Delegates are entitled to claim travel, sustenance and other expenses at the end of the DM.
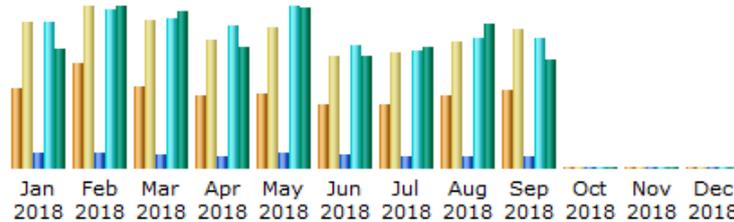
Website and CRM stats (September 2018)

Website

- Unique visitors: 45,363
- Number of Visits: 82,020
- Average time: 251 seconds
- Average pages per visit: 2.62
- Pages: 24215,487
- Hits: 2,247,102
- Bandwidth: 17.43GB

Monthly history

Month	Unique visitors	Number of visits	Pages	Hits	Bandwidth
Jan 2018	46,982	85,396	251,547	2,504,187	18.95 GB
Feb 2018	61,571	94,868	266,134	2,723,000	25.73 GB
Mar 2018	47,780	86,730	237,447	2,559,358	25.14 GB
Apr 2018	42,300	75,632	206,332	2,437,865	19.18 GB
May 2018	43,926	82,737	263,094	2,775,167	25.64 GB
Jun 2018	36,907	65,956	243,989	2,102,609	17.86 GB
Jul 2018	37,193	68,338	200,228	2,031,304	19.38 GB
Aug 2018	43,132	74,123	200,128	2,231,634	23.08 GB
Sep 2018	45,363	82,020	215,487	2,247,102	17.43 GB
Oct 2018	0	0	0	0	0
Nov 2018	0	0	0	0	0
Dec 2018	0	0	0	0	0
Total	405,154	715,800	2,084,386	21,612,226	192.40 GB

CRM

Records: 65,000

New records created in June: 261

Records modified in June: 1,117