Scottish Book Trust Website Development

Invitation to tender

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Introduction

This document was prepared following consultation with staff across Scottish Book Trust and is intended as a guide to the key requirements for the new Scottish Book Trust website. It is not a complete and detailed list of every requirement for the project or prescriptive.

The intention is to provide enough information to allow you to put forward a recommendation based on the best possible fit for our needs.

While we have researched available platforms, we do not have a preferred system for the project. We are open to both open source and commercial software, but are keen to minimise the amount of bespoke development work required to ensure we have a stable, easy to maintain and upgrade platform that can be primarily managed in house.

In addition to tendering for a new website, we are simultaneously tendering for a CRM system. The CRM and website must be fully integrated to allow for effective programme participation and data management. You are invited to tender for either the website or CRM, or for both the website and CRM contracts. If tendering separately, the appointed suppliers will be required to work closely with the CRM contractor to deliver the system, and it may be useful to also read the CRM invitation to tender to fully understand the scope of the current projects. If you do not have a copy of the website invitation to tender, or require further information please email sarah.barrie@scottishbooktrust.com or call 0131 524 0189.

Background and business objectives

Scottish Book Trust (SBT) is a charity that changes lives through books, reading and writing. A love of reading inspires creativity; improves employment opportunities, mental health and wellbeing; and is one of the most effective ways to help children escape the poverty cycle.

We:

- give free books to every child in Scotland to ensure all families can share the joy of books at home and to lay the foundations of literacy.
- work with teachers to inspire children to develop a love of reading and writing, creating innovative classroom activities, book awards and author events.
- work with adult learners to tackle social issues and help to improve literacy skills.
- support Scotland's diverse writing community with our training, awards and writing opportunities.
- bring a range of author events to the public, including Book Week Scotland.

We work towards a Scotland where everyone has an equal opportunity to thrive through literacy.

To support us in achieving our aims, we are looking to introduce a new user-focused website to support all areas of the charity.

The website is the key hub of SBT's programmes, allowing users to:

- Find out about, and apply for, our programmes
- Find out more about Scottish Book Trust, our aims and how to support us, either through a donation or through fundraising
- Access resources for use in a professional setting (e.g. downloading our learning resources for teachers and librarians or watching videos of early years experts)
- Enjoy songs, rhymes and stories to inspire a love of books in young children

- Discover ideas for their next book to read
- Read a broad range of content about reading and writing, including blogs, resources, support and advice
- Find relevant events during Book Week Scotland and Bookbug Week
- Discover authors who can come speak and work with students or community groups as part of our Live Literature programme

Website content is managed in-house by SBT staff. The site content is updated daily, with an average of 4-6 new blog posts and 2 book lists published each week.

In the period of June 2016 – June 2017, the site received over 980,000 visits with over 2.5 million pageviews. Nearly half of our traffic during that period visited the site on mobile devices.

Our reach as a charity is nationwide, and we increasingly rely on digital means to ensure that people across the country can access our services. We require a stable, easy-to-adapt platform that can grow with us in the most cost-efficient way possible.

Background

The existing SBT website was launched in 2012 and uses Drupal 7 as its CMS. A number of bespoke Drupal modules also function to administer a number of SBT's key programmes and we are currently also seeking, via a separate tender process, to replace these with a new CRM system.

Some of the key drivers for introducing a new website are:

- While the existing site has some basic responsive features, and has since had significant adaptations made to improve the responsiveness, it is not responsive by default
- The limited number of templates available to us severely limits our ability to promote and differentiate programmes
- The current site structure is based solely around the structure of SBT and not around user journeys or effective information grouping
- We have developed a significant amount of content since the launch of the new site and the combination of the site navigation and ineffective search make it difficult for users to find content
- The current site is not built to effectively communicate who we are and what we do
- The site was not built with fundraising in mind, and SBT's plans for the coming years are heavily based around fundraising

SBT currently maintain three separate websites. The main website at scottishbooktrust.com, our site for teenage creatives at thestoryis.co.uk (Wordpress) and the First Minister's Reading Challenge at readingchallenge.scot (Drupal 7). In the future, we would like to integrate all three sites as part of the main scottishbooktrust site, and while that work does not full under the scope of the current project it should be considered when proposing a platform to us. We would hope to work with the supplier(s) appointed for the current project to integrate the sites as part of a second phase of the development.

Project goals

Our key aim is to develop a user-friendly, easy-to-navigate website that allows us to effectively position SBT as a charity, communicating who we are, what we do, how users can take part and how they can support us.

Our programmes put our service users at the heart of everything we do, and this must be reflected in the experience of using our website.

- Effective storytelling, allowing us to communicate who we are and what we do
- User-focused navigation and structured user journeys
- Significantly improved search performance
- Fully mobile responsive
- Help us to make effective use of video
- Effective donate page that integrates with the new CRM
- Reduce bounce rates across the site
- Increase time spent on site and number of pages viewed per session
- Increase referrals and subscriptions to our email newsletters

Audience

With programmes supporting people from birth to old age, Scottish Book Trust has an incredibly wide audience.

Professionals
The largest share of our audience consists of professionals and practitioners, using the site content and resources as part of their professional practice.

- Teachers - Primary and secondary
- Adult learning professionals
- Early Years professionals
- Librarians – school and public
- Programme partners - other charities, community groups, prisons etc

Parents
With programmes covering birth to late teens, parents of all ages of children currently use the site, although the largest share of that is parents of Bookbug-age children, 0-5.

Writers
We provide content for writers of all levels, from those looking to take the first step to published and well-known writers looking for their next career steps and for support to take their work out to the public.

- Aspiring writers looking for writing prompts and advice
- More established writers looking for support to take them to the next stage of their writing career
- Published writers looking for opportunities and to take part in our Live Literature scheme

General readers
Less easy to define, we have a wide audience of people with a general interest in books, reading and our work. These users are accessing the site for their personal interest and use,

rather than for professional reasons. Our understanding is these they are predominantly female, age 25-55. We are keen to diversify this audience to ensure our programmes reach a wider audience.

Additionally, we have a large international audience, particularly for the book lists and for the content created around Book Week Scotland

Phasing and timeline

The start date for the project should be as soon as possible after the contract is awarded (September 2017).

We will work with the appointed agency to identity the project roadmap and delivery schedule, and identify a timeline for switch over from existing systems to new systems. While the final timeline will be dependent on a number of factors, most importantly the CMS development and integration, we would need to be able to fully transition to the new website within 6-9 months.

This agreed delivery schedule will be used to agree the project and payment milestones.

Integration

SBT are also seeking to commission a new CRM system to allow us to manage contacts, programmes and donations. The website must be able to integrate with the CRM to allow users to log in to:

- Update communications preferences
- See the status of their programme applications

Live Literature profiles are currently managed exclusively by phone and email, and we are keen to integrate the website and CRM to allow authors to log into the website and update elements themselves, with those edits approved and published by SBT staff.

We currently use the following external systems. While the majority of any integration work will be included as part of the project to integrate these systems with the CMS, they are included here for information

Mailchimp
https://mailchimp.com/
Mailchimp is used to handle our email newsletters and some additional mailings where we have clear permissions. As well as CRM integrations, there will be some areas where the site will require integration with Mailchimp, for example as part of a desire to increase sign-ups to the newsletters

Eventbrite
https://www.eventbrite.co.uk/
SBT currently use Eventbrite to organise some external events. These include workshops and conferences, as well as some of our Early Years training events.

JustGiving
https://www.justgiving.com/
Individual donations are currently handled through JustGiving. As part of the new website, the majority of individual donations should be handled directly through the site. However, we will retain some links to JustGiving to support users managing their own fundraising on the platform.

Submittable
https://www.submittable.com/
We use Submittable to manage applications for the New Writers Awards and Next Chapter Awards.

Surveymonkey
https://www.surveymonkey.com/
Evaluation is a major part of all of our programmes, and we conduct a large volume of user surveys with Surveymonkey.

Online payments

At present, the only parts of our programme that will require the ability to make payments online are online donations and booking for some events (e.g. Bookbug conference) However, we are currently investigating alternative funding routes. One of the possibilities involves online sales, whether merchandise or possibly packaged versions of our programmes for an international audience. Any website and CRM system that we introduce must have the ability to introduce ecommerce without significant development being required.

Social media

We have almost 40,000 followers on Twitter and over 13,500 likes on Facebook and are keen to make the most of our presence on social media to increase social sharing and interaction of our work.

Fundraising

Fundraising is a new focus for SBT as we seek to diversify our funding.

Our new website should support this shift in positioning by making clear that Scottish Book Trust is a charity, our objectives, aims and how users can support us.

At present, individual donors to SBT must leave our website and go to JustGiving to donate. While we will continue to use JustGiving for some fundraising purposes, users should be able to securely donate to SBT without leaving our website.

While the donate function must integrate with the new CRM, we require a clean, branded easy-to-use interface for the donation process with the user able to donate in as few screens as possible.

Research hub

We would like a new site section to be developed that will allow us to showcase the research that we have commissioned. This research supports the work that we do and underpins the case for support.

Accessibility

The SBT website is an inclusive space, and users should be able to participate in our programmes regardless of accessibility issues. The site must conform to the [Web Content Accessibility Guidelines (WCAG) 2.0 framework](#) to as high a degree as possible.

Content

SBT has invested heavily in developing a significant amount of content in-house. Where content is required to be redeveloped for the new website, we expect the majority of this to be done in-house. We consider content development to be an important on-going process and while we will agree areas where the content must be refreshed before launch, the development will continue following launch and should not delay the product launch.

To leverage the diverse range of content we produce, we would like to improve how we cross-link and interrelate our content in the logic of the website.

The existing website has a number of different content types and a summary of these is included below. We are keen to work with the appointed supplier to determine if these content types should continue in the same format or if changes should be made.

SBT is currently performing a content audit to identify the content that should be carried over to the new website, the content that is out dated and either should be rewritten or can be deleted and the content that needs to be created for the new website. We are also very open to thoughts about where new content or content types can be introduced to support the new website.

Existing content types

Book Lists (and book list books)
http://www.scottishbooktrust.com/reading/book-lists

The current site hosts over 540 book lists. These lists are grouped by age (adult, teen, 8-11, 3-7 and 0-2) and are then tagged with themes.

Book list books (there are currently over 5400 individual book list books) are the content type for each individual book included on book lists. An individual book can be added to more than one book list.

We are keen to make his section significantly more searchable and flexible to better allow users to find books and to help us to cross-promote book lists site-wide.

Blogs
http://www.scottishbooktrust.com/blog

We have four key blog strands – Reading, Writing, Teachers & Librarians and Early Years. Each strand is a category of a single blog, and each strand is updated once or twice a week. The blog is the main focus of our content efforts.

The blog is a collaborative effort across the charity, with a significant amount of content commissioned from partners. At the moment the blog is slightly hidden, and we would like to find ways to better showcase the range of blog content we create, both on the home page and across the site.

Pages
(Example: http://scottishbooktrust.com/about/support-us/the-need-for-our-work)

We currently have a single static page template, which is used for all content that does not fit under any other content type. This template is very basic, and does not give us much flexibility as to how content is managed – we do sometimes try to use these pages, but those attempts are reliant on using non-responsive tables. We would like to have more flexibility around how we display content so that we can adapt the layout to the content and not the other way round.

Learning Resources
http://www.scottishbooktrust.com/learning/learning-resources/

This is a searchable interface for learning resources aimed at teachers and librarians. We currently have over 220 learning resources, typically in the form of downloadable PDF or Word documents, or embedded video files. While this section is currently working well, we are open to ideas to more effectively develop it.

Bookbug Song and Rhyme Library
http://www.scottishbooktrust.com/bookbug/bookbug-song-and-rhyme-library

The most recent addition to the SBT site, this is a searchable interface for songs and rhymes in video and audio format. Videos are hosted on AWS, and songs are currently hosted on Soundcloud. We have additional funding to add more content to this section and while it is currently working well we, again, are keen to develop it to make it as effective as possible.

Public participation campaign
http://www.scottishbooktrust.com/writing/nourish
Each year we invite members of the public to submit stories on a theme – in 2017 it was "Nourish". These stories are moderated and published on the website, with a selected group of stories later being published in a book.

We are keen to find ways to improve the process of submitting work for the campaign, integrate the data with our new CRM, and effectively present the current year's submissions and archive the submissions of previous years.

Book Week Scotland and Book Week Scotland events
http://www.scottishbooktrust.com/book-week-scotland
Book Week Scotland is an annual, nationwide celebration of books and reading. SBT has a number of our own events, organised and run by us, but the majority of the events around the country are run and managed by Book Week Scotland partners. SBT support our partners by hosting searchable listings of all Book Week Scotland events.

At present, we gather event information via SurveyMonkey and run a CSV import into the website, however we are keen to explore if it is possible for partners to add the content directly to the CMS to be moderated and published by SBT staff.

The Book Week Scotland site section is currently forced to use our standard template and does not have a distinct identity. We are keen to be able to present this section more flexibly than at present, and almost to give it the feel of a subsite, albeit one very clearly under the SBT umbrella.

Video
SBT is increasingly using video content to support and market our programmes, and it is vital that out new website handle this flexibly and efficiently. We are aware that schools and other local authority partners a

re often unable to access content hosted on YouTube, Vimeo etc.; therefore, effective video hosting on the SBT site is crucial. Video files are currently hosted on Amazon AWS in mp4 format.

We would like to use a more effective video player that gives us:

- Ability to set thumbnail/preview screens for videos
- Ability to add subtitles where relevant
- Ability to embed video content into other content types as required
- Easy to update to ensure some semblance of future-proofing

Audio
The site also hosts a number of audio files. The majority of these are embedded from Soundcloud, but we would also like to find an alternative way of managing audio if possibly, given recent concerns over Soundcloud as a platform.

Author directory profiles
http://www.scottishbooktrust.com/author-search
The SBT website currently holds a directory of around 750 authors who are eligible to carry out Live Literature-funded events. This directory area requires a significant rework to make it easier to find the author that suits a user's event and to make more effective use of the profiles.

At present, authors are listed in A-Z order and we would like to be able to present this in a less strict, perhaps even randomised order.

Authors need to be discoverable and their profiles should reflect the range of their work. It should be possible to find authors by age group, types of work and work themes. Integration with social media may be desirable here and rich media must display.

At present, authors' publications are linked to their profiles as a book type separate from the book list books. There are currently more than 4300 books attached to author database authors. We're keen to explore combining the content types of author books and book list books to facilitate deeper discovery and reduce the quantity of duplicate content on the website going forward.

To improve management of this section, we would like authors to be able to log in to the website to make updates to their profiles, with these changes being moderated by staff

before being made live. In addition, we would like these profiles to be included in any content review system, with profiles that have not been update in an agreed period being flagged up to staff and the authors.

Training and documentation

Full training of the new system is expected to be delivered for key Scottish Book Trust staff before final website delivery, along with comprehensive documentation that will allow us to train further users internally.

Future-proofing

The CMS must be flexible and allow easy integration of new content types and digital projects as they arise. Ideally, we will be able to handle the majority of this in-house with appropriate training; however. we do not currently have developer resource in-house, so will require additional support for future developments. However, we would prefer not to have to rely on a single supplier for this work.

Permissions

We currently use a number of permission levels internally to allow staff access to different features. At a minimum, we require the following access levels:

1. Access to all features and administrator options
2. Access to all content options including publishing, access to edit and update the site navigations with some administrator features
3. Access to add, edit and create content but no access to publishing

It should be simple to add new staff and to give them the appropriate permissions to manage the system, as well as allocating new permissions as new features are released.

Workflow

The existing site does little to support the publishing workflow, and we are keen that the new site will remedy this. At present content is drafted by staff across the charity, before being edited and/ or approved by website editors, with the communication around this handled in Basecamp.

Revisions
The CMS should allow for page revisions to be kept and reverted to if need be, as well as indicating which users changes were made by

Scheduling
The CMS should allow for post and pages to be scheduled in advance for automatic publishing and also unpublishing if possible.

Content review
Ideally the system would be able to set a review date for content to be checked for relevance

Hosting

Our current hosting provider is Pulsant and we are keen to continue this arrangement if possible. We will provide access to the hosting as required during development. However, if you have a preferred hosting provider, or if your proposed solution requires a specific hosting solution, please specify this in your response as well as itemising costs for a year of hosting.

The site will require an SSL certificate.

Your response

Design

Please indicate how you would approach the website design, user experience and information architecture for this project. The SBT brand guidelines are available as an appendix to this document. If you have received this document without the brand guidelines, please email sarah.barrie@scottishbooktrust.com to request a copy. The documents are available for information purposes only and we do not expect to see design proposals as part of your response.

Overview of the system

Please provide an overview of your proposed solution, including how the CMS meets the requirements of Scottish Book Trust.

Practical demonstration

We do not expect you to provide a demonstration bespoke to our requirements, however it would be beneficial for us to receive a demonstration of the system you intend to deliver and how it can be configured to meet our requirements. This can be in the form of an in-person demonstration, online demonstration or video demonstration.

Delivery Process

Please outline the process that you will take to deliver the product, from project kick-off to deployment. Please also identify which project management system(s) you would prefer to use to deliver the project.

We are keen for staff across the charity to be involved in the discovery process around the site focus, design and IA, and the time required to do this should be built into your delivery plan.

CRM integration

If you are tendering for both the CRM and website developments, please give details of similar projects that you have previously completed.

If you are tendering for only the website development and not the CRM system development, please demonstrate how you have previously worked with a separate supplier on project planning and website integration on a similar project.

Licensing costs

For systems with licensing costs, please provide a breakdown of types of licences available, the licenses we will require and the expected costs of these licenses.

Ability for internal management and configuration

We intend that the website will eventually be managed in-house, as far as possible. Please explain the extent to which changes and updates can be managed internally, and where it is likely that we will require external suppliers for support and maintenance.

Details of support and maintenance

Please detail your suggested or required support and maintenance levels for this contract. We will require at least 12 months of suitable support following the warranty period of this project. Please detail the on-going costs and how the support will be arranged and managed.

Details of warranty period

We require a fixed warranty period for the project (or for each release of the project) to ensure that any problems in the system can be detected and fixed as part of the initial cost. Please give details of the warranty terms that you will be applying to this project.

Hosting of the system

Please indicate how the system should be hosted, if it will be cloud- or server-based and if it requires any particular hosting platforms to operate. If you have any recommended hosting platforms, you may supply a cost for the hosting of the system of a yearly basis, however this does not commit SBT to using your preferred supplier for this system.

Your project team

As far as possible, please identify who the key contacts for this project will be within your organisation and the team members who will be working on its implementation.

Case studies of similar projects and contact details for two referees

Please identify case studies of similar projects that you have completed. We also require a minimum of two referees from similar projects that you have worked on. These referees will only be contacted if you are shortlisted for the development.

Awarding criteria

Award criteria	Weighting (%)
Clear understanding and interpretation of the website requirements and how effectively the presented solution meets the needs of Scottish Book Trust	30
Relevant expertise and experience of large website developments, particularly in a charity environment	30
Relevant experience of integrating websites and CRM systems	20
Value for money	20

Project management

The project director for Scottish Book Trust is Moira Findlay, and the project lead is Sarah Barrie, Website Manager.

Please direct all correspondence to Sarah Barrie in the first instance.

The appointed supplier will be required to meet regularly with Scottish Book Trust and a regular communications schedule will be agreed.

Tender deadlines

All tenders should be submitted by 11am on Friday 25 August 2017. Those received before that date and time will be retained unopened until then.

Shortlisted tenders will be invited to face-to-face meetings at SBT's Edinburgh office in the week commencing 11 September 2017.

Budget

A budget of up to £35,000 is available for the website development.

In additional to the implementation of the website, we expect the following items to be covered by the budget:

- Discovery phase and project management
- Full staff training
- Full integration with the new SBT CRM

Any travel and accommodation costs incurred by you during the project will also be included in the budget and will not be covered separately by SBT.

All figures quoted exclude VAT.

Key contact

Sarah Barrie, Website Manager, Scottish Book Trust

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