![NICVA logo]

NICVA Northern Ireland Council for Voluntary Action

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ITT - WEB REQUIREMENT SPECIFICATION

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Approver:	Gary Clarke

1.   Structure of Requirements and Form of Response Required

1.1   The following sections of this document detail the specific requirements that suppliers must respond to, to enable an assessment of their capability to deliver the required websites.

1.2   For each line of the Statement of Requirements (SoR), suppliers should indicate how their proposal meets the requirements. The categorisation of requirements throughout this SoR is determined by the associated marking. These markings are defined in Table 1 below:

Table 1: Categorisation Markings

Category	Description
M	Requirements marked "M" in a requirements table represent mandatory requirements that MUST be met by suppliers.
S	Requirements marked "S" in a requirements table represent requirements that SHOULD be met by suppliers.
C	Requirements marked "C" in a requirements table represent requirements that COULD be met by suppliers

1.3   **An ITT - NICVA (Web) Supplier Functional Requirements Response spreadsheet template accompanies this document**. This spreadsheet replicates all the requirements from sections 2 to 5 of this document. This spreadsheet must be completed with your responses to each requirement. Please note that a "Yes/No" answer is not acceptable and will be considered as "non-compliant" when evaluated.

1.4   Suppliers should meet all mandatory requirements relating to the websites/services. Failure to comply with mandatory requirements may lead to a supplier's proposal being discounted from further consideration.

1.5   While every attempt has been made to give suppliers an accurate description of NICVA's requirements, suppliers must form their own conclusions about the methods and resources needed to meet these requirements. No guarantee can be given, and no representation or warranty (expressed or implied) is made as to the accuracy or completeness of the contents of this document. Neither NICVA's nor its advisors shall be under any liability for any error, misrepresentation or omission.

2. Design Requirements

2.1   An updated design for the new single website is required, consistent with NICVA'S brand guidelines.

2.2   Suppliers are asked to note that NICVA is currently engaging a local company to deliver an updated brand for NICVA.   This is a separate project to this tender and will deliver updated design assets and brand guidelines, that will be shared with the successful supplier of this tender.

2.3   The new website must meet the following design requirements:

2.4	*Design Requirements*	**M / S / C**
2.4.1	The supplier must deliver clear improvements on the usability and accessibility of each of the current sites and ensure that the new, single website is fully compliant with all relevant legislation. The website must reflect good practice with respect to layout, navigation and usability (i.e. meet users' intuitive expectations with respect to navigation and menu positioning and follow a consistent theme and structure throughout). Suppliers are invited to provide details on how they will approach the project to ensure compliance, usability and an intuitive information architecture for a single website that will deliver a significant volume of content. Examples of how suppliers have previously delivered websites with a significant volume of content and functionality are requested, showing how these were delivered along with an easy to navigate, intuitive information architecture. NB it is understood that NICVA's site structure is likely to change and develop during completion of Phase 1 of the project so any examples provided will be for illustration purposes only and used to assess suppliers design capabilities.	**M**
2.4.2	The websites must display appropriately on different screen resolutions i.e. suppliers must commit to creating a responsive website design that can adapt to the different screen sizes that website visitors may be used to, whilst offering them the same experience. Suppliers are invited to provide details on how they have approached the delivery of previous websites that have accommodated different screen resolutions.	**M**

2.4.3	The website design must be compatible with the full range of web browsers for example, but not limited to, Microsoft Edge, Mozilla Firefox, Safari, Chrome, Opera etc. Suppliers must detail how they will ensure that the delivered website is compatible and will work with a range of standard browsers.	**M**
2.4.4	The website design, where possible, must conform with accessibility guidelines (e.g. is accessible as a text only version and can be navigated with images switched off) and via screen readers. Suppliers must state their commitment to delivering websites that are compliant with the Web Content Accessibility Guidelines (WCAG) 2.2 and Public Sector Bodies (Websites and Mobile Applications) (No. 2) Accessibility Regulations 2018. Suppliers must ensure that sites meet the W3C AA standard as a minimum. Suppliers are invited to provide details on how they will ensure delivery of an accessible website and provide examples of this approach working on previous projects	**M**
2.4.5	Suppliers must detail how the site will be optimised for search engines (e.g. using an XML site map) and how this will be maintained once the website is 'live'. Suppliers are invited to provide details on how they have delivered this on previous projects and demonstrate how these sites continue to be managed.	**M**
2.4.6	It is recognised that new imagery may be required for the web site. Suppliers are invited to detail how they would propose images are updated and how they arrange for new, relevant images. NB the preference is for high resolution images that reflect the target audience of NICVA i.e. the community and voluntary sector. It is noted that images uploaded to the site will need to be configured and scaled / cropped to different configurable/ predefined dimensions and be optimised for mobile devices.	**M**

2.5   As stated in section 2.2 NICVA will provide a copy of its brand and style guidelines to the successful supplier, and it is envisaged that the new website design will be delivered in accordance with this.

3.   Functional Requirements

3.1   The new web site must include several core functional components to ensure that the sites are easily maintained, and the sites deliver functions useful to each target audience. In summary it is anticipated that the website will include the following core functional components:

- A **content management tool** that allows authorised users to maintain and publish content across the website,
- A **role based-security model** that accommodates a range of users including NICVA staff and external users accessing and using NICVA services,
- A **member's directory** that promotes NICVA's members and associate members,
- A **business directory** that allows registered external users to advertise events, news and services to the community and voluntary sector (NB this is to be separate from the NICVA members directory) including managing:
  - A **services directory** that allows registered external users to advertise their services to the community and voluntary sector (NB this is to be separate from the NICVA events directory),
  - A **news management** tool that allows registered external users to publish news and articles to the community and voluntary sector (NB this is to be separate from the NICVA news listing),
  - An **events management** tool that allows registered external users to advertise events to the community and voluntary sector (NB this is to be separate from the NICVA events directory),
  - A **venue management** tool that allows registered external users to advertise venues to the community and voluntary sector (NB this is to be separate from the NICVA facilities directory),
- A **news management** tool that allows NICVA staff to publish news and articles of relevance to the community and voluntary sector,
- An **events management** tool that allows authorised NICVA staff to promote and manage NICVA run/sponsored events to the community and voluntary sector,
- A **facility (e.g. room) management** tool that allows authorised NICVA staff to promote and manage NICVA facilities (e.g. rooms) that are available to hire by the community and voluntary sector,
- A **grants directory tool** that allows authorised NICVA staff to promote information on available grants of relevance to the NI community and voluntary sector,
- A **job opportunity management** tool that allows authorised NICVA staff, NICVA members and registered users to promote and manage job opportunities that are available in the community and voluntary sector,
- **Online booking** and **payment** tools for NICVA events.
- Intuitive and easy to use **search and filtering tools** that allow all (high volume) events, news, grants, jobs and business directory data lists to be searched, filtered and ordered by website users.
  - A **media connect** service that connects voluntary and community organisations with journalists and media professionals

3.2   While the volume of requirements noted in this document may appear substantial suppliers are respectfully reminded that a careful review of the requirements will not highlight any complex functionality. It is worth noting that many functional areas replicate requirements of other areas. For example, the required **members directory** and the **business directory** have very similar requirements as do the two **event management** tools.

3.3   The volume of requirements stated reflects NICVA's desire to be as specific as possible as to the scope of the work so suppliers can be as accurate as possible with their costs, project approach and recommended delivery timescales. Where suppliers do not agree with the need for and/or practicality of delivering any stated requirement suppliers are encouraged to provide their reasoning and proposed alternative approach. Suppliers have been invited to tender due to their perceived experience in web development and evidence of experience should always drive supplier responses.

		M / S / C
3.4	*Content and User Management Functions*	
3.4.1	A Content Management (CM) tool could be provided as part of any new website. If adopted, this tool should include functions to, for example: • Allow for the creation and management of users of the content management tool and what they are permitted to edit and update i.e. user roles, • Allow for the management of web page templates to allow for the rapid set-up of new web pages (i.e. to allow a user to select a page template and create a new page based on a predefined page layout), • Allow for the management of widgets (I.e. news panels, newsletter signups) to be created and used across multiple page templates, • Allow for the management of menu links, • Allow for the management of an image library, • Allow for the management of documents and rich content (I.e. to allow for documents/videos/video links to be uploaded once for linking across pages for download) or viewing as appropriate, • Provide a 'WYSIWYG' editor for the creation and maintenance of content on individual web pages, • Allow for the management of meta-tags across the site including descriptions with alternative and title text on images and files, • Allow for the management of all links across the site (ideally including checking and validation of links), • Allow for the management of legal statements e.g. privacy, member terms of use, cookie policies. • Support the searching of the information held in the Content Management database. The CM tool must be intuitive for use by non-technical staff. All content must be date tagged (i.e. date created, date last updated) to ensure ease of maintenance. Suppliers must define **clearly** how security is provided in the CM tool highlighting any limitations that may exist.	**M**

3.4.2	The updated website should support different types of users representing, for example: • NICVA members, • Associate NICVA members, • Organisations registered on the NICVA business directory, • Individuals registering for news, event and/or job updates, • Non-registered users visiting the site, • Journalists, • NICVA staff, • Site administrators. It is envisaged that the Supplier will work with NICVA to define each of the user groups the website is to support and what content and functions are most relevant to each group. It is envisaged that the Supplier will ensure that the content management system is configured to provide a clear **role-based security model** that allows each user type to only access/see content and manage information/use functions to which they have been granted access.	**M**
3.4.3	The content that is displayed to each user should reflect their user type once logged in with selected website pages only visible to members that are logged in. It is envisaged that each user type will be presented with information, content and functions that reflects their user type. For example, NICVA members logged into the site should see a user dashboard that allows them access to any 'member only' content such as grants information, member only events etc.	**M**
3.4.4	The content management system must support the management of the overall site content by ensuring that selected NICVA staff can be restricted to only managing content that is relevant to their roles. It is envisaged that 2 - 3 NICVA staff will have system administration access to manage all content, users and key site parameters. NB External registered users must have access to maintain information relating to their organisation and services only and as defined by how the members and business services directories are configured.	**M**

3.4.5	An audit trail of all changes to the site content should be maintained to allow site administrators to see when changes have been applied to the website and by who.	**S**
3.4.6	When changes are being made e.g. page content updated or news items added it should be possible to preview the change before it is placed live on the website. In addition, it should be possible to roll back any change so that a page can be reinstated if required. Suppliers should be clear on any limitations with this functionality.	**S**
3.4.7	It is anticipated that the website will include a range of pages providing the content (to be reviewed and pruned before being transferred to the new website) from the current websites. This will include sections such as, but not limited to: • An 'About us' section including, but not limited, documents on NICVA's strategy, plans and financial records, • A 'resources' section including, but not limited to, a range of documents useful to members and non-members e.g. policies, document templates, research findings and campaign information. Supplier must detail how they would propose the existing content is reviewed and **migrated to the new website**. This detail must include descriptions of any tools that will be used and examples of content migration on similar projects.	**M**
3.4.8	It is anticipated that selected content added to the website (e.g. news items) can be automatically shared quickly with NICVA's social media accounts e.g. X (formerly Twitter), Facebook and LinkedIn accounts to minimise the effort required to share this content. Suppliers are invited to provide details on how this can be accommodated.	**S**
3.4.9	NICVA generates numerous emails to its members and registered users of its current websites and uses Mandrill (a Mailchimp add on) for sending transactional emails. Additional mail lists are managed separately in Mailchimp. It is envisaged that the new website will integrate with Mandrill and Mailchimp and allow for the management of numerous email lists.	**M**

3.5	User and Member Registration	
3.5.1	Visitors to the NICVA website must be able to **register and create a user account** on the NICVA website (e.g. in the event they wish to apply for NICVA membership on behalf of their organisation or to add their organisation to the business directory). It is envisaged that users will register and maintain/control of their details through a single place on the NICVA website i.e. users must be able to set up an account and then manage which services they wish to avail of (i.e. opt in to email and newsletter sign ups and links to key functional components on the website). The account registration form will capture the following information as a minimum: • Registrants name, • Registrants' organisation name, • Registrants email address. On submission of a registration form it is envisaged that an email will be generated and sent to the email address provided to validate the new user account. It is envisaged that the registration form will be supported by an appropriate reset password function. Suppliers are asked to provide details on their recommended approach to prevent/minimise the creation of duplicate user accounts. NB a registered user is NOT the same as being a NICVA member i.e. any visitor to the website can register a user account but an application form must be submitted and accepted for an organisation, and for the registered users associated with the organisation, to become a member organisation.	**M**

3.5.2	Registered users can select to associate themselves with an existing **member organisation**, but a process must be in place to ensure that this association is valid. Suppliers are asked to provide details on their recommended organisation validation process when registered users attempt to associate their accounts with a member organisation. **NB there are currently over 1,400 NICVA members.** Suppliers are reminded that registering for a user account on the NICVA website is NOT the same as applying for (organisational) membership of NICVA. It is important to stress that any reference to NICVA's members or membership in this requirements document is referring to organisations rather than individuals. Suppliers should also note that it is possible for individual users to be associated with **multiple** different (member and non-member) organisations, e.g. as employee, trustee or volunteer, at the same time. Suppliers are invited to demonstrate from their experience how best to manage this so that users can access the content and functions on the website that they need to have access to whilst ensuring minimal duplication of user and organisation records. Recognising that the individuals will move on from organisations and/or change roles it is important that a means by which the users and the user roles of an organisation can be updated and maintained is provided. Suppliers are invited to detail how they will ensure that the organisations will be able to maintain its user details or notify NICVA where this is needed (with the goal that the organisation details are maintained and accurate over time).	**M**
3.5.3	The website must provide a form that allows non-member organisations to complete an **application form for NICVA membership**. It is envisaged that this membership form will capture the following information as a minimum: • Details of the applying organisation: ○ The organisation name, ○ A short name (e.g. an acronym or trading name), ○ The organisation address and postcode, ○ Organisation address type (e.g. home or business), ○ Publish address in members directory checkbox, ○ Organisation type (NICVA managed drop down list), ○ Organisation description (for displaying in the member directory),	**M**

- o A checkbox detailing of the organisation address should be visible in the member's directory.
- Details supporting the application:
  - o Text description of the organisation's needs and priorities from NICVA membership,
  - o How did the organisation hear about NICVA membership (NICVA managed list),
  - o Organisation income band (NICVA managed list),
  - o Membership type applying for (NICVA managed list),
  - o Charity registration number,
  - o Companies house number,
  - o Inland revenue number.
- Details of the key contacts in the organisation:
  - o CEO name,
  - o CEO email address,
  - o Invoicing contact name,
  - o Invoicing contact email address,
  - o Renewal contact name,
  - o Renewal contact email address.
- Checkboxes granting permission for NICVA to send emails to each email address provided for marketing / promotion of services and products.
- A checkbox confirming permission for NICVA to send emails to each email address provided specifically for the administration of membership and formal notices under Company Law.
- A checkbox confirming the applying organisation subscribes to NICVA's vision and values (currently visible at https://www.nicva.org/about-us/vision-mission-and-values).

Validation of organisation names must highlight where an organisation already exists in the members directory and prevent users completing applications for organisations that are already NICVA members or associate members.

When a membership form is submitted an email should be automatically be generated and sent to the person submitting the form confirming their application.

NB any list values should be manageable by NICVA site administrators. It should be noted that the three contacts sought as part of membership application can be the same individual so an easy means of completing the form needs to be provided.

3.5.4	As membership application forms are received a means by which these requests are visible to authorised NICVA staff must be provided. NB The Suppliers are asked to review the CRM integration requirements in section 3.12 of this document. It is envisaged that details of all membership applications will be passed to the CRM system where a new member ID will be assigned to the applying organisation if the application is accepted. Once a decision on whether the membership application is accepted or not a means of sending an outcome email to the person making the request should be sent though it is envisaged that this will be generated from the CRM system. Once approved users associated with the member organisation must be able to update and maintain the details of their organisation with details shared with the NICVA CRM system updated as appropriate.	**M**
3.5.5	As new member organisations are added to the NICVA CRM following successful membership applications a **member ID** will need to be held beside the user accounts associated with the member organisation. This to ensure that functions and content available to members only is visible to the users associated with the member organisation are available. Suppliers are asked to review the CRM integration requirements in section 3.12 of this document and provide details on how they will ensure member IDs are held against user accounts linked to member organisations.	**M**
3.5.6	As member organisations are added and associated user accounts verified then details of the organisation should be added to and be visible as part of a **member's directory** visible on the website. Where applications have been accepted from organisations seeking to become associate members these should be added to an **associate member** directory. NICVA would welcome opinions and feedback as to whether separate directories should be available on the website or whether a single directory is visible with filter options available to allow member and associate members to be clearly distinguished.	**M**

		The members and associate members directory should be **searchable** by website visitors. The search tool should be easy to use and intuitive with search results easily **filtered**.	
	3.5.7	Registered users associated with a member organisation should be able to view all current and past activities associated with their organisation e.g. event and training bookings, room hire, membership renewals, their support requests etc when logged in. A single view of all activity for each member organisation will aid NICVA in highlighting the diverse support enjoyed by its membership and encouraging continued membership. NB as some support requests can be of a sensitive nature users should only see the support requests associated with their own user account.	**M**
	3.5.8	Suppliers are invited to provide details of how they would recommend that users associated with registered member organisations and organisations in the organisation's directory are encouraged to revisit and validate their account information on a regular (e.g. annual) basis. Suppliers should provide examples from previous projects where they have supported the ongoing maintenance of user data.	**M**
	3.5.9	Organisation **member fees** are currently based on income bands (see https://www.nicva.org/join-us/costs for details of the current fees). Authorised NICVA staff should be able to manage the membership fees applied to each income band and set new fees (e.g. as part of an annual cost increase) to take effect on a specified date. Registered users associated with a member organisation should be able to manage their membership subscription when logged in and see when their renewal date is and how to renew by a simple click – prompting a payment / invoice as appropriate. Where membership subscriptions lapse permissions and access to 'member only' functions should be revoked with suitable explanatory messaging displayed to relevant users on screen.	**S**

| 3.5.10 | All directories across the new website should be **searchable** and **filterable**.

Currently the NICVA members directory includes a volume of information on over 1,400 organisations and this will likely increase over time. It is important that the members directory presents information in an intuitive way that allows users to quickly search, filter and view members of interest.

Suppliers are invited to detail how they have delivered similar functionality on other projects and worked to ensure that categorising and tagging of records is efficiently managed to allow for flexibility as needs change over time and information (potentially) needs to be re-categorised and restructured. | **M** |
|---|---|---|
| 3.5.11 | Registered users associated with member organisations must be able to record that they are willing to be connected to journalists and the media to share their sector expertise.

The website must allow registered users associated with member organisations to:

- Select one or more topics in which they have specific expertise,
- Record their explicit consent to be contacted by journalists about their selected areas of expertise.
- View the directory of journalists and media listed on Media Connect.

The website must support journalists registering for a user account and allow them to:

- Record and share their contact details (including explicitly granting their permission for these to be shared/made visible),
- Select one or more topics in which they have specific interest.
- View the contact details of users from member organisations who have given their consent to be contacted and who match on topics of interest.

It is essential that consent to be contacted is explicitly granted by users. Suppliers are invited to detail how they will ensure this and how consent will be validated on an ongoing basis. | **M** |

3.6	*Business and Services Directories*	
3.6.1	The current CommunityNI.org website allows non-member businesses and organisations to be included in a **register of organisations** that can provide services to the voluntary and community sector. This **organisation register** is separate to the member directory and currently holds details of over 4,200 organisations. It is envisaged that the new website will include a form that allows new organisations to complete an **application form to join the organisation register**. It is envisaged that this application form will capture the following information as a minimum: • Details of the applying organisation/business: o The organisation name, o A short name (e.g. an acronym or trading name), o The organisation address and postcode, o Publish address in business directory checkbox, o The organisation telephone number, o The organisation email address, o The organisation website URL, o Organisation type ((NICVA managed list), o Organisation description (for displaying in the organisation directory), o Charity registration number (if applicable), o Companies house number (if applicable). • Details supporting the services the organisation offers (and allowing for multiple services to be added): o Title for the service, o Text description of the services the organisation provides, o Service type (NICVA managed list and allowing multiple selections). • Checkboxes granting permission for NICVA to send emails to each email address provided for marketing / promotion of services and products. When an organisation application form is submitted an email should be automatically be generated and sent to the person submitting the form confirming their application. Validation of organisation names must highlight where an organisation already exists in the organisations directory and prevent users completing submissions for organisations that are already on the register.	**M**

3.6.2	Registered users can select to associate themselves with an existing **organisation in the organisation directory**, but a process must be in place to ensure that this association is valid. Suppliers are asked to provide details on their recommended validation process when registered users attempt to associate their accounts with an organisation. Suppliers should also note that it is possible for individual users to be associated with multiple different organisations in the organisation register e.g. as employee, trustee or volunteer, at the same time. Suppliers are invited to demonstrate from their experience how best to manage this so that users can access the content and functions on the website that they need to have access to. The organisations directory should be **searchable** by website visitors. The search tool should be easy to use and intuitive with search results easily **filtered**.	**M**
3.6.3	As organisations are added and associated user accounts verified then details of the organisation should be added to and visible as part of an **organisation's directory** visible on the website. When an organisation is verified and added to the organisation's directory the **services** that the organisation provides should be added to a **business services directory**. The business services directory should be **searchable** by website visitors. The search tool should be easy to use and intuitive with search results easily **filtered**.	**M**
3.6.4	Registered users associated with organisations on the organisation directory must be able to add and manage **news** articles. • Add new news articles and edit/archive these as required, • Ensure that news articles are categorised and tagged so that they can be easily searched and filtered by website users. News articles can come in a variety of forms and therefore the news management must allow for the inclusion of rich content such as video, audio, slideshows and other multimedia content. Any storage limitations or additional hosting requirements to allow for this must be detailed.	**M**

		NB the news added by registered users associated with organisations on the organisation directory will be displayed in a news article list **separate** from the news published and managed by NICVA staff i.e. NICVA published news will be managed by NICVA staff and displayed separately on the website. It is also envisaged that news added by organisations will also be visible when viewing the organisation from within the business and services directory i.e. a history of all news added by the organisation should be visible both in the business directory news listing and when viewing the organisation's details.	

	3.6.5	Registered users associated with organisations on the organisation directory must be able to add and manage details of **events** they are running. The website must allow registered users associated with organisations on the organisation directory to:
		
		• Add new events and edit/archive these as required.
		• Ensure that events are categorised and tagged so that they can be easily searched and filtered by website users.
		• Capture a range of information on each event record including, for example and not limited to:
		   o Event name,
		   o Event description (text description of the event),
		   o Event instructions,
		   o Event dates (NB events can span multiple days),
		   o Event venue,
		   o Event start and finish times,
		   o Event cost per participant,
		   o Maximum number of participants,
		   o Whether the event is to be delivered online or in person or both,
		   o A URL to allow interested parties to follow up with the advertising organisation and access more information/booking details.
		
		It is important that rich formatting of text is allowed on event titles and descriptions (e.g. to bold titles, include bullet points, add hyperlinks etc).
		
		When event is added it should be added to the event's directory. The events directory should be **searchable** by website visitors. The search tool should be easy to use and intuitive with search results easily **filtered**.
		
		NB the events added by registered users associated with organisations on the organisation directory will be displayed in an events list **separate** from the events published and
			M

		managed by NICVA staff i.e. NICVA published events will be managed by NICVA staff and displayed separately on the website (plus in the organisations' event list if appropriate). It is also envisaged that events added by organisations will also be visible when viewing the organisation from within the business and services directory i.e. a history of all events added by the organisation should be visible both in the business directory events listing and when viewing the organisation's details.	

	3.6.6	Registered users associated with organisations on the organisation directory must be able to add and manage details of **venues** they have available for booking**.** The website must allow registered users associated with organisations on the organisation directory to:
		
		• Create and manage details on the venues available for hire and to edit/archive these as required.
		• Capture a range of information on each venue record including, for example and not limited to:
		   o Venue (e.g. room) name,
		   o Venue description (text description of the event),
		   o Venue capacity (e.g. seating 50 - 100),
		   o Availability,
		   o Venue cost.
		   o Organisation name,
		   o An organisation contact email,
		   o An organisation contact telephone number,
		   o Venue address,
		   o Notes (i.e. to capture any specific requirements such as access details).
		   o An URL to allow interested parties to follow up with the advertising organisation and access more information/booking details.
		
		It is important that rich formatting of text is allowed on venue titles and descriptions (e.g. to bold titles, include bullet points, add hyperlinks etc).
		
		When venue is added it should be added to the venue's directory. The venue's directory should be **searchable** by website visitors. The search tool should be easy to use and intuitive with search results easily **filtered**.
		
		NB the venues added by registered users associated with organisations on the organisation directory will be displayed in a venues list **separate** from the venues published and managed by NICVA staff i.e. NICVA published venues will be managed by NICVA staff and displayed separately on
			M

		the website (plus in the organisations' venue list if appropriate).	
	3.6.7	Suppliers are invited to provide details of how they would recommend that users associated with registered businesses/organisations in the business directory are encouraged to revisit and validate their account information on a regular (e.g. annual) basis. Suppliers should provide examples from previous projects where they have supported the ongoing maintenance of user data.	**M**
	3.6.8	NICVA is keen to explore charging annual fees to non-member organisations in the organisation's directory for the advertising of the organisation and its services (including advertising venues and events). While no decision has been reached on this, the option to include this as part of the project or later should be allowed for. It is currently envisaged that advertising will be free for member organisations but a chargeable service for non-member organisations. Authorised NICVA staff should be able to create a tiered payment structure and select which tier applies to each organisation on the business directory.	**S**
	3.6.9	All directories across the new website should be **searchable** and **filterable**. Currently the organisation directory includes a volume of information on over 4,200 organisation (currently) and this will likely increase over time. It is important that the organisation directory presents information in an intuitive way that allows users to quickly search, filter and view members of interest. Suppliers are invited to detail how they have delivered similar functionality on other projects and worked to ensure that categorising and tagging of records is efficiently managed to allow for flexibility as needs change over time and information (potentially) needs to be re-categorised and restructured.	**M**

3.6.10	Any form used to capture personal information on the website should include appropriate links to privacy statements detailing how NICVA uses personal information. Users should be prompted to complete checkboxes granting their permission for personal information to be held and used by NICVA as part of completing any form that is used to capture personal information.	**M**

3.7	*NICVA News and Resource Management*	
3.7.1	NICVA publishes regular **news articles** and **resources** to its members. The website must allow authorised NICVA staff to: • Add new news articles and resources and edit/archive these as required. • Ensure that news articles and resources are categorised and tagged so that they can be easily searched and filtered by website users (with tags being definable by NICVA to provide a structured approach to categorising content). • Publish individual news articles in multiple places on the NICVA website if required (e.g. on the NICVA news page and on the business directory news page). NB news articles can come in a variety of forms and therefore the news management must allow for: • Inclusion of rich content such as video, audio, slideshows and other multimedia content, • Linking to other third-party sites and promoting their content (assuming permissions have been correctly sought), • Blog creation and management including subscription. NB Resources usually take the form of advice notes, templates, information sheets and similar documents. Whereas news articles will have a short lifespan and topical relevance resources have an ongoing usefulness and should therefore be easily searched for and found.	**M**
3.7.2	Website users should be able to easily search and filter news and resource items to be able to quickly find articles and materials that meet their criteria. Search and filtering tools must be easy to use and intuitive. It is envisaged that filters available to users searching content will reflect the categories and tags defined by NICVA. Ideally the most frequently tags and categories should be available as buttons or links to improve the ease with which to find content.	**M**

| 3.7.3 | Authorised NICVA staff should be able to select specific news articles and resources and promote these via 'widgets' on selected website pages (e.g. the home page and/or an events page).

Suppliers are invited to detail how they would recommend selected news articles and resources are best shared across the website (while recognising that most news articles will age and become less relevant over time). Ideally authorised NICVA staff should be able to upload articles and resources and specify an 'archiving' or 'review' date at which point the article will be updated or replaced with another specified article or no longer be visible. | **S** |
|---|---|---|
| 3.7.4 | Authorised NICVA staff could be able to designate specific news articles and resources as being for 'members only' with these only appearing to member users who are logged in.

Ideally 'member only' news articles should include an opening teaser of content to display to non-members and encourage take up of membership. | **S** |
| 3.7.5 | A key piece of content that NICVA publishes is its 'State of the Sector' (see https://www.nicva.org/stateofthesector).

While not a news article it is a high-profile resource that provides details on the on the size, scope and finances of the Northern Ireland Voluntary, Community and Social Enterprise Sector. This content is a mix of data tables, charts and commentary.

NICVA would like to introduce a means of ensuring that key details currently included in this resource are stored and are available for benchmarking/comparative content as new figures and information become available over time i.e. to allow new details to be added on the state of the sector at a given point in time (e.g. 2024) and for this to be compared with the previous dataset (e.g. 2022).

Suppliers are invited to review the current state of the sector and provide details, from their experience, how this could be maintained and delivered in the new website. | **M** |
| 3.7.6 | Users of the NICVA website should be able to subscribe to any or all the various email newsletters available to their user type e.g. some of the newsletters will be for members only and the ability to subscribe to these must only be available for members. | **M** |

| | | Any subscription form should include appropriately worded privacy and legal statements that subscribers must sign up to.

The option to export subscriber lists to Mailchimp must be supported and/or host Mailchimp sign up forms to transmit subscriber data to the correct Mailchimp audience list. | |

3.8	NICVA Event and Training Management	

3.8.1	NICVA offers a wide range of **training activities and events**. Some of these are for members only while others are for a wider audience from the community and voluntary sector.
	
	The website must allow authorised NICVA staff to:
	
	• Add new events and training and edit/archive these as required.
	• Ensure that events and training activities are categorised and tagged so that they can be easily searched and filtered by website users. The goal is to ensure that all training and events are grouped together by themes (e.g. HR, Leadership, governance etc) so that users can filter and identify relevant content quickly.
	• Capture a range of information on each training and event record including, for example and not limited to:
	   o Event/Training name,
	   o Event /Training description (text description of the event),
	   o Event/Training instructions,
	   o Event/Training dates (NB some events can span multiple days with different/flexible starting times or be part of a rolling programme),
	   o Event/Training venue and location,
	   o Event Training start and finish times,
	   o Event/Training cost per participant,
	   o Maximum number of participants,
	   o Target number of participants,
	   o Event administrator,
	   o Whether the event is to be delivered online or in person or both,
	   o Whether the training is accredited or not,
	   o Whether the training is 'open' for registrations (i.e. in the event of wanting to promote an event in advance of registration opening and/or to switch off registration when the number of participants has been reached),
	   o Type of accreditation where relevant including the awarding body and level of award/accreditation.
	• Allow selected training and events to be for members only with registration for this restricted to only be available when logged in.
	
	The website must allow external users to:
		M

• Register for events and ensure that a range of information on each registration including, for example and not limited to:
    o The name of the person registering,
    o A contact email,
    o A contact telephone number,
    o The job title of the person registering,
    o The organisation name,
    o Organisation address,
    o Notes (i.e. to capture any specific requirements such as dietary or access requirements),
    o Whether the attendee will be attending in person or remotely (as defined by the event).
• NB for the above it is preferred that for logged in users that registration details are auto populated where possible and can then be edited as needed.
• Receive an automatically generated email acknowledgement after submitting an event registration form.
• Cancel their event registration if needed i.e. when displayed, events must include a link to a cancellation policy and allow supporting documents to be uploaded and displayed alongside the event details. NB cancellations outside of the timeframes permitted by NICVA's cancellation policy may be charged a cancellation fee.
 	
NB it is important that rich formatting of text is allowed on event titles and descriptions (e.g. to bold titles, include bullet points, add hyperlinks etc). Suppliers should also note that selected events/programmes can be open to join at any time and therefore have no formal start and end dates.	

3.8.2	As events are added by authorised users these must automatically populate a **training and events calendar** and events directory (as detailed in section 3.6.5) available to website users. As the training and events calendar will present a volume of information that will change month on month it is important that the events calendar presents information in an intuitive way that allows users to quickly access and view events of interest. Suppliers are invited to detail how they have delivered similar functionality on other projects and worked to ensure that categorising and tagging of events is efficiently managed to allow for flexibility as needs change over time and information (potentially) needs to be re-categorised and restructured. NB NICVA is open to exploring the use of third-party products/add-ons that are integrated into the NICVA website if this provides a cost-effective solution and meets requirements. Any costs included in supplier proposals must be proportional and realistic to the over project cost.	**M**
3.8.3	NICVA is currently investing in the development of its **online Learner Management System (LMS)** – known as the NICVA Academy. The modules for this are in the very early stages of development and testing. Ultimately NICVA plans to offer a range of free and paid for accredited courses to complement its Training Calendar. The LMS is being developed by Inico Digital and is based on Moodle (version 4.1). Suppliers are invited to provide details on how the NICVA Academy can be integrated with the events calendar, when the academy becomes available, so that one overall solution is presented to websites users and that details of events, whether delivered in person, online or via the Academy are fully integrated.	**M**
3.8.4	As bookings are made to specific events the number of remaining spaces available should be displayed to encourage those viewing the event details to secure the remaining places.	**C**

3.8.5	Registered users should be able to see all their current and historic event bookings when logged in. Registered users should be able to cancel bookings that have yet to be completed. NB Ideally registered users from non-member organisations should see the savings they would have made on event bookings if they had been a member.	**M**
3.8.6	When events and training activities pass their end date (where this has been specified) then the event or training activity should be automatically removed from the training calendar/events listings and registrations should no longer be possible. Authorised NICVA staff should also be able to turn registrations off for events where the maximum number of participants has been reached.	**M**
3.8.7	When NICVA run significant events (i.e. large-scale conferences) the option of creating a microsite for each of these is of interest. Ideally any microsite should stand alone but link to the main NICVA website booking functions. Suppliers are invited to detail their experience of developing microsites alongside an existing website and how they would approach any microsite set up and maintenance.	**S**

3.9	Facilities and Support Management	
3.9.1	NICVA provides **facilities (e.g. rooms)** that are available for hire by members and non-members. To allow NICVA staff to prioritise who has access to facilities it is NOT envisaged that bookings will be made online but that *requests for bookings* will be submitted and then reviewed by authorised NICVA staff. The website must allow authorised NICVA staff to: • Create and manage details on the facilities available for hire and to edit/archive these as required. • Capture a range of information on each facility record including, for example and not limited to: • Facility (e.g. room) name, • Facility description (text description of the event), • Facility capacity (e.g. seating 50 - 100), • Availability, • Facility cost. The website must allow external users to: • Request the booking of facilities and ensure that a range of information on each booking request is captured including, for example and not limited to: o The name of the person making the booking request, o A contact email, o A contact telephone number, o The organisation name, o Organisation address and postcode, o Dates and times facility required (including alternatives), o Number of people to be accommodated (text description), o Preferred room set up (NICVA managed drop down list), o If catering is required, o Notes (i.e. to capture any specific requirements such as access requirements). • Receive an automatically generated email after submitting a room booking request.	**M**

3.9.2	As booking requests are submitted a means by which these requests are visible to authorised NICVA staff must be provided. It is envisaged that a list of all booking requests will be available to authorised NICVA staff via the website, but the management of booking requests will be managed through the NICVA CRM (see section 3.12 for details of how the website is to integrate with NICVA's CRM system).	**M**
3.9.3	As facilities are requested the availability of other facilities for booking should ideally be visible through an appropriate view available to website users. The goal is to make the availability of facilities for bookings easily visible to aid rapid booking and to encourage further bookings of other facilities.	**S**
3.9.4	Registered users should be able to cancel booking requests that have yet to be completed. It is envisaged that the new website will simply direct users to email NICVA with their cancellation request and the cancellation request will be managed via NICVA's CRM system. NB If a cancellation request is received from a registered user that falls outside of the time frames allowed for cancellations as defined by NICVA's cancellation policy a cancellation fee may be charged.	**M**
3.9.5	NICVA provides **support** to members. The website must allow registered member users to create and submit support requests. The support request form should ensure that a range of information on each support request is captured including, for example and not limited to: • The name of the person making the request, • A contact email, • A contact telephone number, • Details of the support requested, • Type of support requested (NICVA managed list). The individual submitting a support request should receive an automatically generated email after submitting the support request. This email should quote a unique support reference number. NB NICVA provides information and guidance to its members and not legal advice. An appropriately worded statement to this effect must be included on the support form with links to signpost to legal advice if appropriate.	**M**

	It is envisaged that the support form will integrate with NICVA's CRM system as detailed in section 3.12 of this document with the support request being managed via the CRM system once received.	
3.9.6	Registered users should be able to see all their current and historic bookings and support requests when logged from a single view.	**M**

3.10	Grant Management	

3.10.1	NICVA publishes details of (third party) grants available to the community and voluntary sector in Northern Ireland (see grant-tracker.org for details). The new website must allow authorised NICVA staff to:
	
	• Add details of new grants and edit/archive these as required.
	• Capture a range of information on each grant record including, for example and not limited to:
	   o Scheme name,
	   o Scheme summary (text description of the grant scheme),
	   o Scheme description (text description of the grant scheme),
	   o Instructions on how to apply to the grant,
	   o Link to the funder's website,
	   o Scheme status (e.g. open, closed, archived etc),
	   o Scheme opening date (NB this can be blank for schemes that have no formal opening date i.e. rolling programmes),
	   o Scheme closing date (NB this can be blank for schemes that have no end date),
	   o Exclusions i.e. details of who is ineligible to apply and activities that are not supported by the grant,
	   o Funding amount (often provided as a range by the funder or an amount up to),
	   o Funding source i.e. where the grant funding originates from (as the body to apply to may be a third party/managing agent),
	   o Contact details for funder I.e. Name, email address, website, telephone details etc,
	   o Funder location (NICVA managed drop down list),
	   o Key words list (to aid searching and filtering of grants records by users),
	   o Region (NICVA managed drop down list),
	   o Last review date,
	   o Exclude from weekly email checkbox.
	
	NB it is important that rich formatting of text is allowed on grant record titles and descriptions (e.g. to bold titles, include and indent bullet points, add hyperlinks etc). In addition, suppliers should note that grant schemes operate in a wide variety of ways from rolling programmes or schemes that open for applications on annual or quarterly basis.
		M

	It is proposed that a checkbox is included in the grants record: 'Exclude from weekly email'. When this is selected will ensure that the grants record is NOT included in the weekly grants email even if the 'last review date' has been updated. This will allow administrators to check records and note them as reviewed when there is little or no changes and know that these will be excluded from the weekly email. In addition, ideally the closing date for applications/next deadline date would be included in the weekly email where available.	
3.10.2	It is imperative that authorised NICVA users can categorise and tag grant records so that they can be easily searched and filtered by website users. It is envisaged that: • Authorised NICVA staff can create default grant-types that they can select one or more of when creating and editing grant records. • Authorised NICVA staff can create default region codes that they can select one or more of when creating and editing grant records. • Authorised NICVA staff can edit previously created grant-type and region codes over time with the integrity of the underlying data being maintained. Suppliers are invited to detail how they have delivered similar functions (not necessarily grant-related) on other projects and worked to ensure that categorising and tagging of records is efficiently managed to allow for flexibility as needs change over time and information (potentially) needs to be re-categorised and restructured.	**M**
3.10.3	As grant records are added these should be displayed in a **grants directory** visible to registered member users. Members who are logged in should be able to easily search and filter grants records to be able to quickly find relevant grant records (new and archived) that meet their criteria. Search and filtering tools must be easy to use and intuitive as feedback/experience would indicate that the ability to quickly search and filter grant record lists is paramount to users engaging and benefiting from this information. NICVA authorised staff should have a search function that allows them to quickly find a grant scheme relating to a specific funder operating a large volume of grant schemes. For example, Community Foundation NI has over 100 schemes many of which are recurring programmes and currently users need to scroll through all the schemes to find the correct one to update.	**M**

	Filtered lists should automatically display all categories and tags available to allow users to select and filter down into grant records quickly and easily. Filtered lists should include record counts and provide easy to use means of navigating between pages as well as means to exclude archived records and highlight grant records with closing dates soon. Search results lists and filtered lists should be reorder-able by key information (e.g. by closing date, region, grant type etc). Suppliers are invited to detail how they have delivered similar functions (not necessarily grant-related) on other projects and worked to ensure that filtering and displaying of records is efficiently delivered and be intuitive to new and repeat users.	
3.10.4	Authorised NICVA staff should be able to set individual grant records so that they are only visible to registered members and/or different member types who are logged in. Grant records that are set to be visible to members only should not be visible through searches and filters to anyone who is not logged in.	**S**
3.10.5	Members who are logged in must be able to flag individual grant records for follow up and have these visible in a 'my tracked grants' list from the members dashboard. Flagging records for follow up must include the ability to set the members own dates for reminders and actions. Ideally links in the 'my tracked grants' list should link to the relevant external funder websites (rather than only linking to the Grant Tracker detail of the grant). Members who are logged in must be able to add their own notes beside individual grant records with the note's existence highlighted on any lists of grants that the member is viewing.	**M**
3.10.6	Members who are logged in should be permitted to save searches and filtered lists for revisiting and have these visible in a 'my saved grants searches' list from the members dashboard.	**S**

3.10.7	Authorised NICVA members must be able to add general guidance notes and instructions in support of the overall grants functions I.e. to promote best practice and to provide general funding news and advice. Adding guidance and instructions should allow for the management of documents and rich content (I.e. to allow for documents/videos/video links to be uploaded once for linking across pages for download) or viewing as appropriate.	**M**
3.10.8	Authorised NICVA members should be able to categorise and add general advice and guidance information so that as users filter grants information that the supporting information also reflects the filters applied.	**S**
3.10.9	Suppliers are invited to suggest any mechanism that would make the identification of new grants information that could be added to the grants register easier and less time intensive. For example, NICVA would be keen to explore the use of bots or AI to see if these could aid the population of the grants register (and only if NICVA has complete control over what is subsequently added to Grant Tracker). NB this is an example of how the new website could develop over time. Suppliers are reminded to be realistic of what can be achieved initially and to always prioritise requirements delivery appropriately.	**C**
3.10.10	NICVA charge an annual fee to users (members and non-members) who are registered to use the current grant-tracker.org website. It is envisaged, as part of the new website, that Grant-Tracker will become a resource that is available for members as part of their annual membership. Non NICVA member organisations that would like to access Grant Tracker will be required to pay an annual subscription (as per the current site). Authorised NICVA staff should be able to create a tiered payment structure and select which tier applies to each organisation seeking access to Grant-Tracker.	**M**

3.10.11	As part of migrating existing grants information to the new website NICVA is keen to review and update the taxonomy that is used to categorise grant scheme records (and that is then used to filter grant records lists). For example, the existing 'Topics' list needs reviewed, and grants records updated accordingly.	**M**
	Suppliers are invited to evidence how they have supported the updated records during data migration on previous projects and provide detail on the approach to supporting this during the migration of grants records.	
3.10.12	NICVA currently send out three Grant Tracker email bulletins. One is a weekly email summarising new grant schemes added in the past week or updated in the past week. The second summarises grant schemes with upcoming deadlines and the third is a monthly summary of all grants on Grant Tracker.	**S**
	Member users should be able to opt in to receive any or all grants' emails.	
	The weekly email to members should only detail those grant schemes that have significant updates to their information (e.g. key dates or new funding information added) and that are current (i.e. not closed or archived). It is envisaged that grants administrators will update the 'last review date' on any grant record they have reviewed and/or updated and select a checkbox if the grant record is to be included in the weekly email.	
3.10.13	NICVA currently uses Mailchimp and Mandrill (a Mailchimp add on) to manage various email lists needed for the administration of Grant Tracker. These include, but not limited to, email lists for users whose Grant Tracker subscription is expiring soon, whose subscription has expired and those who have cancelled their subscription.	**M**
	It is imperative that the details of the subscribers to Grant Tracker are migrated to the new website and that the email lists that are needed can be maintained and shared with Mailchimp and Mandrill.	
	Suppliers are invited to work with NICVA to streamline how email lists and required bulk emails are managed for Grant Tracker, recognising that this will now be part of one integrated website and not 3 - 4 stand-alone sites.	

3.11	Job Opportunities	
3.11.1	NICVA currently publish job opportunities in the Northern Ireland community and voluntary sector on communityni.org/. At any time, there is likely to be 300 - 400 open job opportunities published. The new website must allow registered users and NICVA Staff to add details of new job opportunities and edit/archive these as required. There should be three possible means by which registered users may create job opportunities: • A simple self-upload with no online application functionality i.e. registered user completes the online jobs form and accept appropriate legal statements to display their job details in the NICVA jobs board/listings. • A simple self-upload with online application functionality i.e. registered user completes the online jobs form and accept appropriate legal statements to display their job details in the NICVA jobs board/listings plus recruiters can choose to have applicants submit their application via the website i.e. through inclusion of an 'Apply Now' option. • Assisted service where users can request additional support from NICVA prior to an advert going live. This may include a review of the advertisement and all supporting documents, and it is envisaged that users selecting this service will provide further details on the assistance they require. NB It is important that any personal information captured as part of managing job opportunities and the related applications is always managed correctly and, in a manner, fully compliant with GDPR and relevant legislation.	**M**
3.11.2	It is envisaged the website will allow authorised users to publish a range of information on each job opportunity including, for example and not limited to: • Job name, • Job reference number (auto generated), • Job summary (text description of the job role), • Job location, • Role description, • Key duties and responsibilities description, • Personnel specification, • Skills and experience requirements, • Closing date and time for applications,	**M**

	• Web URL (for further information), • Salary, • Hours per week, • Contact address for job, • Contact telephone number for job, • Contact email address for job, • Multiple categories and tags (e.g. to define the job type and aid searching and filtering of job lists). As jobs are added by registered users appropriate legals statements must be displayed with the user having to accept these as part of completing their job advertisement (e.g. to warn those posting jobs that NICVA takes no responsibility for the content of the advertisement in the event of any breach of legislation by the advertisement). NB it is important that rich formatting of text is allowed on job titles and descriptions (e.g. to bold titles, include bullet points, add hyperlinks etc).	
3.11.3	When jobs are being added to the site registered users should be able to upload supporting documents with the size and type of documents that can be uploaded controllable by NICVA website administrators.	**S**
3.11.4	Where the option to allow individuals to apply online to a job advertisement has been selected, Applicants will be required to complete a basic contact form (name, email address, contact number) etc along with the job name, job reference number and recruiting employer details auto populated, and upload completed application form and monitoring form documents. When the advertisement closes, all applications and relevant documents should be collated and generated into a zip file. An email is then sent to the recruiter with a link to login and download the zip file. NB when the closing date and time for a job opportunity has passed an advertisement should be considered as closed with no further applications permitted to be added to it. The details of the advert should remain visible to NICVA staff and registered users from the organisation who created the job advertisement. Recruiters should be able to see the number of applications received in real time (but not be able to access the files until after closing). Recruitment documents (blank) can be retained for future use in other adverts without the need to upload each time. Applications will be stored to the recruiter account for 12 months and then auto deleted.	**M**

	Suppliers are invited to provide suggestions for how to deliver an effective jobs service and NICVA will consider alternative processes and approaches where these are demonstrated to be affective. NB While NICVA is keen to ensure that individuals can apply online to job advertisements NICVA staff must NOT ever have access to any sensitive information provided as part of any application. It is envisaged that appropriately worded legal statements will be displayed at all relevant points in the job advertising and application processes. The solution provided must comply with GDPR and all relevant legislation.	
3.11.5	As job opportunities are added these should be displayed in a **job's directory** visible to website visitors. NICVA web site visitors should be able to easily **search** and **filter** jobs records to be able to quickly find relevant jobs (new and archived) that meet their criteria. Search and filtering tools must be easy to use and intuitive as feedback/experience would indicate that the ability to quickly search and filter job lists is paramount to users engaging and using this information. Filtered job lists should automatically display all categories and tags available to allow users to select and filter down into job records quickly and easily. Search results lists and filtered lists should be filterable and reorder-able by key information (e.g. by closing date, job location, job type etc). Suppliers are invited to detail how they have delivered similar functions (not necessarily job-related) on other projects and worked to ensure that filtering and displaying of records is efficiently delivered and be intuitive to new and repeat users. NB it is envisaged that as the closing date for jobs is passed that details of the job will not display by default in the job's directory.	**M**
3.11.6	The jobs start page should provide a summary of the current volume of jobs that are on the jobs register along with appropriate details of a selection of the organisations that are currently advertising.	**S**

3.11.7	Website visitors should be able to register their interest in a job and to receive a reminder as the job closing date approaches.	**S**
3.11.8	Website visitors should be able to register to receive a weekly jobs email summarising the open jobs on the jobs register and new jobs added in the past week. NB this is currently an automated email created via an RSS feed of all jobs published in the last week and sent via Mailchimp. Ideally users should be able to specify the type of jobs they are interested in with the weekly email personalised accordingly.	**S**
3.11.9	NICVA does not currently charge for the advertising of jobs on its jobs register but is keen to introduce charging for postings and related services. It is currently envisaged that members will receive a minimum number of free job postings each year and then a charge per job will apply. Non-members will pay for each job opportunity they advertise and be charged at a different rate than members. Allowing regular recruiters to purchase multiple job advertisements at a discounted rate is also to be considered. Suppliers are invited to detail how charging can be supported including the option to have annual increases to advertising fees scheduled. In addition, if an organisation selects the option for NICVA to provide support with the job advertisement that an addition charge will be applicable. As the approach to charging for job advertisements has not been finalised it is envisaged that payment terms will need to be very flexible, and the website will cater for this. Suppliers are invited to provide their recommendations on how to provide flexible pricing for job advertisements. NB it is likely that job advertisements will be invoiced for, especially where additional support is provided. The option of collecting payments on-line will be considered where this is cost-effective.	**M**

3.12	CRM Integration	
3.12.1	The website must be extendable and integrate with NICVA's internal CRM system i.e. for details of membership applications, job applications, event and facility bookings to be recorded against organisation records held in the CRM. The goal is to ensure that key activities completed on behalf of members is visible in a single view from the CRM system. NICVA's CRM system is built on **Microsoft Dynamics** (2023 release wave 1 enabled). It is envisaged that as key activities are completed on the website (e.g. membership applications and event and facilities bookings completed) then details of these will be passed to appropriate holding tables within the CRM system. Once viewed and the details checked the CRM administrators will assign the details to the appropriate CRM records using CRM workflow and the request then managed via the CRM as required. It is therefore envisaged that information will be shared with the NICVA CRM system: • As a new **membership application** is completed (see section 3.5 for NICVA membership and section 3.6 business directory membership) details of the organisation applying and the associated contacts should be passed to the CRM. Once confirmed as a valid new application and on the CRM, a new member id should be passed back to the website (and recorded against the organisation and all user accounts associated with the organisation). • As an **organisation's details are updated** on the website details of the changes should be passed to the CRM and if the organisation details are updated in the CRM these changes passed back to the website. • As a new **event/training booking** is completed (see section 3.8 for details of the information to be captured on the website for training and event bookings) details of the booking should be passed to the CRM. If multiple attendees are attending the event from the same organisation, then details of each attendee must be captured in the CRM. • As a new **facility booking request** is completed (see section 3.9 for details of the information to be captured on the website for facility bookings) details of the request should be passed to the CRM. • As a new **Grant Tracker subscription** is completed (see section 3.10 for details of the information to be	**M**

captured) details of the subscription must be captured in the CRM.

- As a new **job advertisement** is completed (see section 3.11 for details of the information to be captured on the website for job advertisement) details of the role should be passed to the CRM.
- As a new **support request** is completed (see section 3.9.5 for details of the information to be captured on the website for support requests) details of the request should be passed to the CRM.

Suppliers must provide details on their proposed approach to meeting this requirement considering if bookings, event bookings, or applications for memberships are cancelled then the details visible to registered users and members when logged in should be updated to reflect this.

It is a mandatory requirement that suppliers *clearly indicate their experience of integrating web sites with other systems/external CRM systems*.

3.12.2	For any booking or support request submitted from a user associated with a member organisation the organisational member id must be visible (but not editable) and added automatically to the request as it is passed to the CRM.	**M**
3.12.3	As the NICVA CRM system exists to provide a single view of all support provided to NICVA members it is important that changes applied to member details on the website is shared with the CRM or where details are changed on the CRM this is shared with the website. Suppliers must explicitly describe how details will be maintained between the website and the CRM and how changes are managed to ensure that there are no discrepancies in the data held on member organisations.	**M**
3.12.4	NICVA is keen to explore single sign on so that registered users of the website only provide the one set of valid login credentials to access all functions to which they have been granted access. By combining the four existing sites into one and by integrating the new site with NICVA's CRM system NICVA is keen to understand if there is added value to be gained by adopting single sign on technology. Suppliers are invited to provide their recommendations on this. Specifically, NICVA would like to ensure that when members are booking a fee-charging product or service (e.g. training, job advert, Grant Tracker etc.) that reference	**S**

	is made to their membership record and member discounted prices are displayed and processed on booking.	

3.13	Payment Processing	
3.13.1	As bookings are completed, for example for events and/or job opportunities, the option for (credit card) payments to be collected must be supported. NICVA currently uses STRIPE for payment processing. NICVA recognises that suppliers may wish to recommend an alternative approach to payment processing. If change to payment processing is proposed, then any costs included in supplier proposals to deliver this requirement must be proportional and realistic to the overall project cost and the initial cost for set up and the ongoing costs to provide this functionality must be clearly stated. NB where the option to pay by credit card is not used then when the details of the booking are transferred to the NICVA CRM then an invoice will be raised.	**M**
3.13.2	Customers of services requiring payment are likely to be mix between those requesting an invoice for payment by BACS or those paying by credit card. In both cases an invoice should be produced and emailed to customer. If paid by credit card invoice should be marked as paid. In addition, not all visitors to the NICVA website seeking to make a payment for a NICVA service will be registered users so any payment processing must support the collection of payments from unregistered users. Suppliers are invited to detail how they would recommend that payment information is best shared with the NICVA Sage 50 finance system. Integrating website payment processing with NICVA's Sage 50 finance system may not be cost effective (but this can be considered if appropriate on completion of the website design/information architecture phase of the project). Accordingly, it is envisaged that, as a minimum, summary reports detailing all payments received on-line should be available to allow NICVA finance staff to post journals at week/day end summarising that period's transactions. If integration with NICVA's Sage 50 system is proposed, then it is preferred that this integration is delivered through an API rather than the import of a CSV file.	**M**

	Suppliers are invited to provide details, from their experience, of how best to ensure the NICVA finance system is updated regularly with payment information.		
3.13.3	Payment functionality must also allow for cancellations and refunds where these are required i.e. in the event of a training activity or event being cancelled or a room booking being cancelled. Suppliers are invited to provide details, from their experience, of how best to ensure that cancellations and refunds are managed.	**M**
3.13.4	It is essential that details of all payments and their status are easily visible to authorised NICVA staff e.g. NICVA's finance team to ensure that any issues raised by members and service users are responded to promptly. Suppliers are invited to provide details, from their experience, of how best to ensure visibility of payment details to authorised NICVA staff.	**M**
3.13.5	Suppliers are invited to detail how they have delivered payment functionality on other projects and worked to ensure that these are taken securely and in accordance with section 75 of the Consumer Credit Act and all relevant current legislation governing online payments e.g. ensuring the solution is fully PCI DSS (Payment Card Industry Data Security Standard) and GDPR (General Data Protection Regulation) compliant.	**M**

3.14 **Suppliers must clearly indicate the cost of developing each of the above functions (detailed in sections 3.4 through 3.13) to allow NICVA to prioritise and select which, if any, functions will be included in the web site redevelopment**. Suppliers must explicitly highlight any requirement that has been detailed in Section 3 of this document that has a significant cost.

3.15 Suppliers are invited to put forward their ideas for any innovative functional components that could be added to the web site to encourage higher visitor return rates and sustained ongoing web site use by the key web site target audiences.

4. Hosting Requirements

4.1 A separate quote should be given for hosting the web site. NICVA reserve the right to arrange their own hosting provider. Any hosting provision must meet the following requirements:

		M / S / C
4.1.1	Suppliers must provide a clear, accurate description of both the minimum and recommended configuration needed to host their proposed solution. This description must include an accurate list of all technologies (e.g. ASP, CGI, .NET, MySQL, PHP etc) that the supplier plans to use in their proposed solution.	**M**
4.1.2	Suppliers must provide a clear, accurate description of both the minimum and recommended disk space required for the proposed website. This must be sized to allow for content growth over the next three years.	**M**
4.1.3	Suppliers must detail the ongoing maintenance activities that need/will be undertaken and the frequency of these to ensure that the security and currency of the hosting platform and web site solution is maintained.	**M**
4.1.4	Suppliers must detail the ongoing backup activities that need/will be undertaken and the frequency of these to ensure the recovery of the hosting platform software and hardware is possible if required. The recovery times of any proposed solution should be clearly stated.	**M**
4.1.5	Access to regular (i.e. monthly), meaningful web statistics is required. Details on how this requirement will be met must be provided. It is expected that statistics will be provided as standard as part of any hosting package.	**M**
4.1.6	Monthly website usage statistics could be emailed automatically to key NICVA staff.	**C**

5. Additional Requirements which must be fulfilled

5.1 The following sections detail requirements that are not functionality specific and are in addition to the requirements documented previously.   It is a mandatory requirement that any supplier must provide clear details of:

- Clear licensing arrangements for the web site and all its component parts,
- Comprehensive and reliable support (ideally locally based) with access to an efficient Help Desk,
- Comprehensive training,
- Clear implementation plan,
- Suitable documentation in support of the web site,
- Support with the development of appropriate privacy and legal statements.

		M / S / C
5.2	*Licensing & IP*	
5.2.1	NICVA must own the web site including all design assets, and all the developed functional components. Suppliers must provide a clear and concise description of the ownership of the final web site and clearly state any licensing arrangements and any ongoing licensing costs that may be due in subsequent years (if applicable).	**M**
5.3	*Maintenance and Ongoing Support*	
5.3.1	It is anticipated that the supplier who is selected to redevelop the websites will also provide support and maintenance on an ongoing basis to allow for routine patching and updates to the content management system and core website components, further enhancements and improvements to the website and support in the event of technical problems arising. This support must be quoted separately in the proposal. Suppliers must define how costs for maintenance and support are structured and provide costs for two years with an option for an additional two years. A clear description of the service levels to be committed to once the website is live must be provided. This should include details of **target response and response times.** NB Suppliers are asked to note that support is anticipated to be used infrequently and any costs	**M**

	proposed should reflect this. Provision of support on a Time and Materials basis is a viable option and the use of service credits in the event of service levels consistently not being met is preferred.	
5.3.2	It is a mandatory requirement that support is provided in a timely manner to ensure that website unavailability is minimised. Suppliers must provide clear detail on their proposed response times in the event of the following: • Critical faults rendering the websites inoperable, • Serious faults where any function/section of the websites is inoperable, • Minor enhancements to the websites being required.	**M**
5.3.3	Suppliers will be expected to provide regular reports on how the support service has been used. Suppliers must indicate their proposed frequency of reporting and their rationale for this.	**M**
5.4	*Training, Testing and Implementation Plans*	
5.4.1	Training materials, training delivery and follow-up support must be available covering the use of the content management system and the functional components of the site. Any training must be carried out in a cost-efficient manner, training as a minimum 2 individuals who can then provide the ongoing training to their colleagues within NICVA. Suppliers must provide clear details of any training to be provided as part of the proposed solution. NB it is envisaged that training materials will cover all aspects of the proposed content management system and delivered key site functionality. Suppliers are invited to detail how they will develop and deliver appropriate training materials.	**S**
5.4.2	It is a requirement that NICVA retain ownership of all training materials for use in training new staff as they join the company. Suppliers must explicitly state their agreement to this in any response.	**M**

5.4.3	Suppliers must detail their proposed approach to **data and content migration** considering, for example, that NICVA currently has circa 1,400 member organisations and some 2,000+ registered user accounts and circa 1,500 events. This detail must include a description of any proposed **data cleansing** recommendations and/or actions proposed and the effort required both by the supplier and NICVA. Suppliers should detail the role that NICVA staff will play in data and content migration.	**M**
5.4.4	Suppliers must detail their proposed approach to **testing** of the new website indicating the different types of testing that will be undertaken e.g. accessibility testing, content migration tests, load testing, security and penetration testing as well as the testing of functional components and integration points. Suppliers should detail the role that NICVA staff will play in all testing.	**M**
5.4.5	A **realistic implementation plan** must be included in any tender response. This must clearly indicate the roles and responsibilities of the supplier and NICVA staff. The implementation plan included in any response submitted to this requirements document must clearly identify the key activities, milestones and deliverables in each project phase. This must include how transition to 'go live' will be managed and the role that NICVA staff will play. **Risks** to successful delivery of the project should also be addressed as part of the plan. Suppliers must clearly outline their experience of delivering similar projects and demonstrate a strong project management approach.	**M**

5.4.6	Suppliers must detail their approach to project management and communication with the NICVA team. Suppliers must demonstrate a formal approach to project management will be adopted and the frequency with which the project plan will be updated, project board/progress meetings will be held and how risks will be identified and managed. Suppliers must clearly state who the project manager for the project will be and provide details of their experience on similar projects within the last three years.	**M**
5.5	*System Documentation*	
5.5.1	Suppliers must provide relevant system documentation to assist in the use of the Content Management solution and any relevant technologies/add-ons they are proposing as part of the solution. Sufficient copies of all manuals and/or system documentation must be provided to ensure NICVA staff has adequate access to this material. NB electronic copies can be supplied to meet this requirement.	**M**
5.6	*Privacy and Legal Compliance*	
5.6.1	In accordance with Data Protection legislation NICVA recognise the importance of including appropriately worded Privacy, Disclaimer and Terms of Use in the new web sites. Suppliers must provide clear details on how they can support the development of any required legal statements and how these will be integrated into the websites.	**M**
5.6.2	Suppliers must provide a clear statement on how they will ensure that the updated NICVA website(s) are fully compliant and provide evidence of how they have supported other organisations to achieve this.	**M**
5.7	*Domains*	
5.7.1	Suppliers are invited to offer suggestions on the appropriateness of the current website domains and offer advice and guidance on alternative, potentially relevant domains that would aid SEO.	**S**