RFP Bidder Questions & Answers

Attention RFP Respondents: This document contains all questions submitted to the ABA for the OPM Project RFP. To protect the privacy of the bidders, the document is organized by the date the questions were submitted and company names were redacted. We thank you for your interest.

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Questions received on August 8, 2019

1. Whether companies from Outside USA can apply for this? (like, from India or Canada)

Yes, companies from outside the USA can apply.

2. Whether we need to come over there for meetings?

Vendors are not required to visit the office or conduct in-person meetings. There are times where it is preferred - for example, discovery and requirements gathering - but it is not required.

3. Can we perform the tasks (related to RFP) outside USA? (like, from India or Canada)

Yes, work related to the project can be performed outside the USA.

4. Can we submit the proposals via email?

Yes, you may submit via email.

5. What is the organizational internal structure that supports the ABA websites?

Primary support groups are the IT Department (supports underlying technology) and Digital Engagement which enforces business rules and content standards.
Questions Received on August 29th, 2019

6. Are the ABA Stakeholders distributed or all located in Chicago?

All stakeholders are in Chicago.

7. In February of 2016, [VENDOR NAME REMOVED] participated in the bidding process for the redesign of americanbarassociation.org and shopaba.org. Is the ABA team involving the same team we presented to in 2016? Could you share a list of ABA team members involved in this RFP?

There are a couple of people who were a part of the Americanbar.org redesign project like Jess Moyar, the CIO. Most of the staff on this project is new. We are not sharing the names of the people on the project other than myself and Jess Moyar.

8. Are there examples of microsites within microsites?

On Americanbar.org, there are 2 examples of microsites within microsites. They are: Center for Public Interest Law and Diversity.

Currently, in Expression Engine, the ABA Journal has a couple of sections of the site that will become “microsites within microsites,” according to ABA nomenclature. One example is legalrebels.com (or http://www.abajournal.com/legalrebels). When the journal migrates on-platform, Legal Rebels will become, a microsite within a microsite.

9. Will ABA content migration be required in one language only (US English). We assume no localization into any other language?

Correct, we require one language (US English) and there is no requirement for localization into any other language.

10. With regards to the training sessions will these need to be conducted in present? If so, to (approx) how many trainees and will they all be in a single location? Will it be a train the trainer situation or training all?

The ABA will defer to the bidder on what they think is best. We prefer to have some training in person, but it is not required if the bidder feels they can provide the same level of service remotely.

11. Is content mostly the same for all users? Or is it mostly personalized to (varies between) individual users / specific user groups?

There is some personalization at the present time and the ABA plans to add more in the coming months.
We have a personalized component “CLE for You” that is placed on CLE Marketplace and CLE Free for Members pages that shows events based on areas of interest selected in the member profile.

We also have premium content that can be viewed by ABA members or members of specific entities only. This content is controlled by premium tags placed on the specific page.

12. ABA states in the RFP that the work will begin Jan 2020. As there is a discovery phase and requirements required for Dec 1 delivery, we will assume that work means development in this context and that cost will also include the Discovery phase which will start in November 2019.

Correct, the work that is slated for January 2020 refers to development. There may be a Discovery engagement prior to implementation but all is subject to negotiation.

13. Is there any recommendation of how long it should last post launch support (from ABA side)? or it will be up to our proposal?

We will negotiate the terms as part of the implementation agreement. Please include a recommendation in your proposal.

14. How many days of ‘client review’ will ABA need for reviewing the project deliverables at various stages of the project?

The ABA will do their best to adjust to meet the needs of the project but ideally we would have 5 business days.

15. During Client review will there be any legal sign offs to be factored into timings during the stages of the project?

Yes.

16. How many Admins are entering content in AEM on a regular basis, or what is the size of the current AEM authoring team?

Currently there are 300 users with Admin rights. Each entity has different publishing needs and they update the site accordingly.

17. If manual content authoring is required as part of the content migration, is the expectation to have this be done by the vendor or will it be done by ABA Admins?

The ABA expects to do manual content authoring if it is required as part of the content migration. If the vendor offers manual content authoring as a service, we are interested, if the budget allows.
18. What's the current publishing process (steps involved to move content from author to publishers, and infrastructure that participates in serving content to customers)?

We have a distributed publishing strategy that allows over 300 authors to publish direct to the website. Each entity (i.e. department or unit) has their own process.

19. ABA mentions "The ABA launched a new website in 2018 using Adobe Experience Manager ("AEM") as the CMS but continued to maintain these microsites because of resource constraints and limitations of the publishing templates." Are the limitations related to the publishing or to the templates themselves?

Time and the need to meet a launch date prevented some additional development from being completed. The templates themselves are also limiting factors.

20. What is the Premium Content Call to Action? (Reference: section 4.3 / iv - UI Requirements)

It is a component that displays if a non-member attempts to view content that is “member-only” or for “members of specific groups only”.

This is an example of a Premium Content Call to Action that exists today:


21. In the section 4.3 / iv - UI Requirements, there is a mention "This project is not a website redesign”. We understand this but the section 4.3 / v - UX Requirements says "This will require enhancements to existing templates or the creation of new ones.” Although this clearly means that the overall site won’t be re-designed, it does mean that new pages or templates will be designed. Can you please confirm.

Yes, your statement is correct.
22. Section 4.3 / vi - Additional Requirements for Publication Microsite
   Is this “microsite” a new page? If it is, do we require to design different templates, more than just customizable modules or sections of the microsite?

   This is negotiable. There is no defined requirement.

23. How many child pages can a microsite contain?

   We have not established a limit; there is no parameter for this currently.

24. Are Magazine Issues Page Templates entirely different than the microsite?

   In AEM, the Issue Page will be part of a microsite. Each issue of a publication will have an Issue page.

25. Section 4.3 / vii - Other Template Variants for Special Projects- Are there different child pages within this other microsite page?

   This is negotiable.

26. How many templates are we required to design?

   There is no requirement; it is up the discretion of the bidder and project team to decide what makes the most sense during the Discovery phase.

27. Are there custom workflows authoring/publishing workflows implemented in the https://www.americanbar.org/ AEM instance currently?

   No.

28. ABA mentions exceptions on the migration: "All articles, blog posts and content pages must be migrated “on-platform” unless otherwise specified." Where can we find these exceptions? or should be part of the discovery phase?

   The exceptions will be defined during Discovery.

29. ABA mentions "Accessibility issues should be addressed as part of the content migration plan", have they already identified those issues? can we have some examples?

   We worked with our vendor to ensure the website meets “double AA” accessibility standards at a minimum. Our Digital Engagement team will be working to address closed captioning for video and audio in the coming year with a 3rd party.

   Below are a few accessibility requirements but the full list of standards can be found on the [WCAG website](https://www.w3.org/WAI/standards-guidelines/wcag/).

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• Keyboard tabbing (hitting tab to navigate through elements/links on a page.)
• Form validation for user feedback.
• Target size for mobile breakpoints

For the migration, the only issue we’ve identified is ensuring images have alternative text that describes the information or function represented by them.

30. The ABA mentions “The ability to pin” featured/highlighted articles. “Pinning” will override default and display article above other content. " Having an example of this functionality would be great

We do not have an example on the AmericanBar.org site. The best example I can think of is the pin a tweet functionality on Twitter. A pinned tweet is static and remains at the top of a profile regardless of when it was posted.

31. ABA mentions "Migration plan must account for “workarounds” that exist in HTML content and factor that into the content migration plan." Do you have a list of "workaround" types currently in place in the 3 websites to be migrated?

No, we do not have a formal list.

The example that was shared with me is the “Want to listen on the go? The Modern Law Library is available on several podcast listening services” area with the blue background on the Podcast pages. The <DIV> is added to the source code editor by the site admin. See: [http://www.abajournal.com/books/article/podcast_episode_93](http://www.abajournal.com/books/article/podcast_episode_93).

32. ABA mentions "spikes in traffic". are there any measurements in order to have a sense of the quantity of recurrences and unique visitors?

There are weekly spikes tied to the release of a newsletter. There are also unplanned spikes tied to current events which are hard to predict.

With respect to the regular spikes, they occur on Fridays (the day we send the newsletter) and one a Monday month when we send the Tech Monthly newsletter.

Here are some stats for the ABA Journal:

*Average # of pageviews during normal times vs. the day of a newsletter*
Online Publications Project RFP Addendum- FINAL
Date Updated: 9/11/2019

- Friday: 91,211
- Other days (including weekends, excluding Tech Monthly days): 27,014
- Tech Monthly: 38,131

**Average # of unique visitors during normal times vs. a spike**
- Daily (excluding Friday): 16,685
- Fridays: 47,955

**Highest spikes from Sept. 8, 2018 – Sep. 9, 2019**
- July 12, 2019: 73,944 unique users; 134,274 pageviews
- Nov. 2, 2018: 64,559 unique users; 141,975 pageviews

33. ABA mentions the need to support social media sharing. Is there already a preferred library to accomplish this?  
We are using the AEM’s Social Sharing Component which is a Facebook and Pinterest sharing widget. More information about this component can be found here: [https://docs.adobe.com/content/help/en/experience-manager-core-components/using/components/sharing.html](https://docs.adobe.com/content/help/en/experience-manager-core-components/using/components/sharing.html)

34. ABA mentions "Ad Server (DSP) - AppNexus (will change)". Is there any information of the capabilities of the new system?  
We will be migrating to SmartAd Server in September 2019. Implementation has not started so we cannot speak to the capabilities.

35. With regard to “9) Creating data feeds to support mobile apps“ - could you please elaborate more about the types of feeds (i.e. json, RSS, xml, etc)?  
MAZ, the mobile app provider, supports RSS, MRSS and JSON feeds.

36. ABA mentions "Adherence to W3C accessibility web standards". Any level required?  
Yes, Double AA standards at a minimum; see response to #29 for more information.

37. Is the AEM version used by Platform site 6.3+? If not, what version are you using?  
Currently running version 6.2 but will be upgrading to 6.4 soon, before the end of 2019.

Premise-based at the moment but moving to a hosting provider at the end of this year.
39. Do microsites have a different domain name?

No

40. Does Platform website (or any of the 3 sites to be migrated) support UGC (User Generated Content)?

We have an integration with Higher Logic, our community management platform. There is UGC in the communities but nowhere else on the platform website. The sites that will be migrated allow commenting on blog articles but we do not intend to continue this once they are brought on platform.

41. Does ABA have any preferred cloud hosting provider?

No

42. Does Platform website use any caching in addition to Dispatcher cache?

No

43. The current website has any CDN configured?

No

44. What is lower environment architecture current state - are there ‘dev’ or ‘staging’ environments with content mimicking production that the vendor would be given access to?

Yes, we have a DEV and QA environment and the vendor will be given access to DEV.

45. ABA mentions "A component that displays recent AND relevant content (relevancy would be determined by algorithm)." Do they already have a definition of relevancy? or it should be defined during discovery phase?

It should be defined during Discovery.

46. ABA Mentions "Using the content audit, work with stakeholders to identify “premium content” and “metered content.””. Have the rules and controls for metered content (e.g. number of articles read, time spent on the website, geolocation, etc.) already been implemented in AEM? Or will they have to be implemented as part of the solution?

We have a meter in place for number of articles read but that is it. We would like to implement additional controls as part of this project.

47. Does the American Bar Association have a proposed budget that you can share for this project?
We left this information out intentionally. We’re looking to the bidder to provide a quote based on the work outlined in the RFP. We want to know what you think it will take, in terms of hours and resources, to complete this project successfully. The number you provide will be renegotiated during procurement, so it is not set in stone. We want to gain insight into process and approach.
Questions received on September 3, 2019

48. While you outlined the primary objectives of this migration what are the corporate business objectives of ABA, both immediate and over the next 2-3 years? How is progress evaluated?

Increasing member engagement, attracting new members and maintaining our reputation as a thought leader in the legal community are the primary objectives.

49. What roadblocks (if any) exist that must be resolved to realize opportunities such as this initiative?

As part of its new value proposition, the ABA has elevated the prominence of its substantive editorial content. However, ABA site is currently on a platform that has not been configured for high-velocity publishing or the sorts of basic editorial functionality one would expect in a publishing operation. There is not a lot of flexibility in our current templates to accommodate a variety of different publishing projects (discrete magazines, newsletters, etc.) There is limited analytical capability built in to begin to articulate metrics around conversions to membership through content.

50. Please describe ABA’s organizational structure and how it affects branding, promotions and other marketing operations.

The ABA is a voluntary bar association of lawyers and law students with over 400,000 members. We are governed by the House of Delegates and Board of Governors. They meet twice a year. We have a President, who is appointed by the Board for a one-year term and an executive director. The organizational structure does not directly impact branding, promotions and other marketing operations.

51. How do your marketing and IT teams connect and create strategies together?

The IT and marketing teams work very closely together and connect on a consistent and regular basis. The “how” is determined by the project or initiative but the two teams are tightly integrated.

52. Is there an estimated budget for this project?

See response to #47.

53. How many potential partners received the RFP?

The RFP is posted to the Americanbar.org website. I contacted 7 or 8 vendors directly.

54. How do you view the health of the current online publications digital presence and viewer base?

Adequate but less than ideal given our ambitions to drive membership using content as the main mechanism to convert users.
55. What is ABA’s vision for the end customer engagement with the online publications?

From a digital content perspective, the goal would be to have the ability to render an elegant reading experience for users who consume content on our main site but also to optimize the distribution of that content so that it can be promoted on a variety of platforms and channels including social media and email.

56. In terms of the viewer lifecycle, what is your definition of an “active” customer?

This is not applicable to the project. From a content perspective, we consider anyone who consumes our content an active user. We track that through page views and email click-through rates.

57. How do you currently engage and retain the existing viewers/readers?

From a content perspective our main tools of engagement are social media, website placement and email.

58. What are you currently doing in terms of recruiting more viewers?

Our newly launched digital content strategy is focused on extending the reach and engagement of the ABA by delivering a more personalized, curated digital content experience wherever members and perspective members would expect to find it.

59. How will customer preference impact the contact strategy?

This is not applicable to the project. This is not primarily a marketing project. The project team is not directly involved in these initiatives. Our goal with this project is to maintain brand identity.

60. What communications do you expect to be trigger-based?

This is not applicable to this project; there are no trigger based communications tied to this project.

61. What are you doing to address data hygiene and further data enhancement?

The ABA has a commitment to data integrity and keeping our customer database up to date. It is an ongoing initiative. To enhance data, the ABA occasionally engages in data acquisition campaigns by purchasing additional information like phone numbers and age from third party service.

62. How are the existing systems currently integrated and how is that data turned into intelligence for the business?

Content Management AEM that’s integrated with a number of different applications. We use a hybrid approach. We have several analytics tool and allow us to make data driven decisions including Adobe analytics. This data is used to monitor the consumption of ABA Content, encourage more consumption and increase registration for ABA events.
Questions Received on September 4

63. The RFP mentions a pre-submittal conference. Has this been scheduled? If so can you share the conference information?

We did not schedule a pre-submitted conference. All questions were submitted in writing and are addressed in this document.

64. How many Authors will be actively publishing content in AEM?

See response to question 16 and question 18.

65. How would you like us to present our cost proposal? The RFP mentions a pricing xlsx.

Apologies, the reference to a pricing XLXS should have been removed.

There is no set format for the pricing information but it should include travel expenses if your company is not located in Chicago, a WBS with hours and rates defined and the cost of any third party tools or outside contractors, if applicable.

66. What version of AEM are you currently using?

See response to #37

67. Where AEM currently hosted?

See response to #38

68. Will hosting and ongoing managed services be something that we should include in our RFP response?

No

69. The RFP mentions a global DAM. What is being used as the global DAM?

Native AEM DAM. We have one instance but are interested in spinning up a second one for this project.

70. Does ABA have licensing for Adobe Assets, and is it currently being used as a standalone DAM?

Yes
Additional Questions

71. Section 4.1 talks about content migration. How do you define content migration? Is this a “lift and shift” or are you looking for a partner to build out templates and placeholders for your to then populate with content?

This is a content migration project. It is a lift and shift however we recognize, due to the volume of content, that it may not be cost effective to have a vendor do all of the copy-and-pasting so we are prepared to do some of that work. We would rely on the vendor to provide a content migration plan, one that specifies how and where to put content (i.e. detailed and comprehensive content mapping plan) and then to assist with the work to the degree that the budget allows.

72. How will decisions be made on this project?

We have a RACI chart internally that clearly defines the decision maker for each category of work. The ABA’s project manager will serve as the liaison between the vendor and the ABA stakeholders. It is the project managers job to ensure decisions are made in a timely manner and by the correct person.

73. When will the ABA upgrade to AEM 7.5? That is our strong recommendation.

Upgrading to 7.5 is not on the current roadmap.

Versions:

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