



Performing Arts Readiness Project Online Tools Development: Request for Proposals

Submission Deadline: January 5, 2018

Scope of Work

As part of the [Performing Arts Readiness \(PAR\) Project](#), Tools Project Phase 2, South Arts seeks to engage a development firm/team specializing in web-based application design and development to develop a brand new online readiness and emergency preparedness planning tool that will replace two extant applications. The development project will build upon Tools Project Phase 1, a collaborative planning phase which resulted in a set of functional requirements, non-functional requirements, and proposed user interactions. This contract will begin March 1st, 2018 and the expected launch date is August 1st, 2018.

The Performing Arts Readiness Project is an Andrew W. Mellon Foundation funded initiative to raise awareness of and build skills around improving emergency preparedness within performing arts organizations. The project is multi-faceted, comprising an educational campaign, an on-site consulting program, and the development of an online planning tool. As conceptualized, the tool will improve upon and supplant two extant applications, ArtsReady and dPlan. [ArtsReady](#), launched in 2011 and developed by South Arts with funding from The Andrew W. Mellon Foundation, is an online emergency preparedness service and web-based application for risk assessment and business continuity plan creation, for post-crisis sustainability. [dPlan](#), developed in 2002 by the Northeast Document Conservation Center (NEDCC) with funding from the Institute of Museum and Library Services and the National Center for Preservation Technology and Training, is an online disaster planning tool designed for libraries, museums, and archives. It provides an easy-to-use template that allows organizations to develop plans that include response procedures, salvage priorities, insurance checklists, etc. Together, these two online tools provide a broad spectrum of organizations with the guidance, resources, and support they need to be ready to respond when a crisis hits, to manage their response, and to quickly recover afterwards.

The development process will be conducted with direct participation by South Arts staff, NEDCC staff, and PAR project partners including LYRASIS, the Project Manager of the PAR grant. It is expected that the PAR team and the development team will conduct weekly conference calls during the development phase in order to coordinate and provide project updates. The project will commence with an in person or virtual launch meeting with the chosen contractor and the PAR team.

Deliverables

The primary deliverable is a tested application that conforms to the functional requirements, non-functional requirements, and proposed user interactions described in the Appendix and other Phase 1 documentation. It is expected that some requirements and interactions may change throughout the development according to design constraints or refinement of the user experience.

South Arts and its institutional partners will provide



Performing Arts Readiness Project Online Tools Development: Request for Proposals

Submission Deadline: January 5, 2018

- Documentation of UX/UI design (Phase 1), including wireframes
- Orientation to existing dPlan and ArtsReady platforms
- Business model framework

Projected Timeline

Note: Project Timeline will be adjusted with the chosen contractor at the beginning of the contract, the below projection is provided for reference.

December 1	Requests for proposals opens
December 11 and 12	Informational calls with potential firms/teams <i>For webcall information, email mquinlanhayes@southarts.org</i>
January 5, 2018	Proposal submission deadline
January 6 – January 19	Calls with finalists and due diligence
January 22	Contract awarded
February	Planning calls with project team
March 1	Contract begins, launch meeting
June - July	Beta test phase
August 1	Launch

Submission of Proposal

It is recommended that all proposers contact Frances Harrell, contact information below, prior to your submission in the event that additional information or amendments to this RFP are available.

Respondents are asked to submit a proposal in electronic format that describes:

- ✓ Your methodology
- ✓ Your work plan (including time estimates and confirmation that you are able to provide the final deliverables within the timeline noted above)
- ✓ Your fees and fee schedule (*do NOT include travel expenses for required travel*)
- ✓ Your project team members, roles, and responsibilities
- ✓ Any unique strengths and perspectives that you would bring to the project
- ✓ Your relevant experience working with arts, cultural, performing arts organizations
- ✓ Two case studies from similar projects
- ✓ Two references

Selection Criteria

Technical Capacity/Quality	50%
Relevant Experience	20%
Budget	20%
References	10%



**Performing Arts Readiness Project Online Tools
Development: Request for Proposals**

Submission Deadline: January 5, 2018

South Arts is an Equal Opportunity Employer.

Questions

Please contact Frances Harrell at fharell@nedcc.org

Prospective bidders are encouraged to visit <https://www.southarts.org/about-us/join-team/> for additional information, including the schedule for informational calls on December 11 and 12, and answers to some Frequently Asked Questions.

**Proposals must be RECEIVED by 5:00PM (Eastern) on January 5, 2018 at
mquinlanhayes@southarts.org.**

Alternate formats of this publication may be obtained by contacting
South Arts at 404-874-7244.



Appendix: Selected documentation from Phase 1 – Requirements

2.1 Product Perspective

This software is intended for persons in administrative or executive level positions at, but not limited to; charitable institutions, colleges and universities, performing arts organizations, museums, archives, and libraries. The product will be deployed as a web application, with a companion mobile application, and the additional services required to properly deliver the product's intended use. All users of the product will access by use of the web or mobile applications. The web application will be the main user interface where users can operate all the provided functionality.

To use the product, users are required to register through the web interface. Whenever a new user is registered, all the required data will be stored in a secure database. Users are then able to login and logout of the system using the web application's login page. All user operations are reflected to the database.

Users will have the functionality to create and edit data in the form of their own workspace which relates to the organization they represent. Any files users create or upload will be kept in either the secure database or a cloud based block storage.

2.2 User Management Requirements

The software will provide simple and common interfaces to registering for the system and accessing personalized accounts contained within privatized sections of the system. We do not recommend the use of login integrations, also known as social authentication, but encourage simple access credentials consisting of no more than an e-mail and password.

It should be required that passwords maintain a pattern that encourages a user to create and maintain secure credentials. Commonly this consists of requiring passwords to be a minimum length of 8 lower and upper case alphabetic characters, and at least one number and a special character (such as punctuation).

Additionally passwords must never be stored as plain text. More information on this can be found in the Security paragraph of section 3.

User profiles will store valuable data points on the creation and retention of key statistics of the users accounts and their usage of the software (e.g., date registered; initial date created (started) plan; date last modified plan; percentage completion of the plan; etc.).

2.3 User Characteristics



Performing Arts Readiness Project Online Tools Development: Request for Proposals

Submission Deadline: January 5, 2018

It is expected that users will have familiarity with the use of web and mobile based software. Users of the Performing Arts Readiness tool will most likely be persons described in section 2.1, the Product Perspective.

2.4 Constraints

The software will be developed in accordance with the Mellon Foundations Intellectual Property Policy, which states that under the terms of an agreement, a grantee:

- Represents and warrants that it will solely own all intellectual property created with grant funds, either as work made for hire or as a result of a contractual agreement;
- Represents and warrants that it has obtained the necessary licenses for third-party content and that the project will not infringe on third-party rights;
- Will make software available, wherever possible, according to the terms of an open source license and in open source repositories, and will publicize its creations;
- Provides the Foundation the right to review the pricing and distribution of any software services, content, and digital products developed with Foundation funds;
- Will maintain any software created for a number of years beyond the term of the grant; and
- Grants the Foundation a nonexclusive, royalty-free, worldwide, perpetual, irrevocable license to distribute any Foundation-funded software and/or digital products for scholarly and educational purposes, in the event the grantee cannot complete or sustain the project.

III. Requirements

3.1 Functionality

This subsection contains the requirements for the Performing Arts Readiness tool. These requirements are organized by the wire-frames discussed in the View Map document. Features from the View Map document are then refined into use case diagrams to best capture the functional requirements of the system. All functional requirements can be traced using a tractability matrix.

3.1.1 Onboarding

The onboarding will create a measurable funnel towards registration for the Tool.

The onboarding questions should be configurable as to remain flexible for future enhancements or UX improvements derived from usage data.

The onboarding should feed a data model that allows administrators of the Tool to see user and organization cohorts.

Example user stories:



Performing Arts Readiness Project Online Tools Development: Request for Proposals

Submission Deadline: January 5, 2018

As a user, I should be able to answer brief questions that help identify my organization.

As a user, my information should be kept in form data until I've completed registration.

As a user, the onboarding screen sequence should navigate me intuitively and allow me to go back to correct information after advancing past each section.

As a user, the onboarding process should reinforce the Tool's value by making me feel the Tool is uniquely identifying me and my organization, and our specific needs.

3.1.2 Account

The account section allows users to update their personal information, change their passwords, manage other users, and update organization details and billing with the proper permission levels.

Billing

Example user stories:

As a user, I should be able to update the billing information for my organization if I have the proper permission level.

As a user, I should be able to view and modify my subscription level if I have the proper permission level.

As a user, I should be able to see the last billing date and amount, and the next billing date and amount, if I have the proper permission level.

Organization

Example user stories:

As a user, I should be able to view and modify details for my organization if I have the proper permission level.

Users

Administrators will have the ability to control permissions and access levels for other users in their organizations. A permissions matrix will be setup to give a base for user roles and read/write/delete ability of different resources within the Tool

Example user stories: As an admin user, I should be able manage other users for my organization if I have the proper permission level.

3.1.3 Assess



Performing Arts Readiness Project Online Tools Development: Request for Proposals

Submission Deadline: January 5, 2018

Guided assessments should be broad enough that they cover general requirements but also areas that directly relate to the organization represented.

Example user stories:

As a user, I should be able to complete guided assessments that direct me to improve my organization's preparedness level and disaster recovery plan(s).

3.1.4 Community

Example user stories:

As a user, I should be able to search the community network for other organizations. As a user, I should be able to select whether or not I want my organization listed in the community index.

As a user, I should be able to find contact information for other organizations in the community list.

As a user, I should be able to discover organizations in need of assistance.

As a user, I should be able to identify when my organization is in need of assistance from other organizations in the community.

3.1.5 Critical Data

The Critical data allows users to archive, categorize, and search for information related to the business continuity or direct responses to crisis management or disaster recovery efforts for the represented organization.

The tool will shield data marked as private, providing a "Show" button which then prompts the user to enter their password in order to view the value of the respective fields. The common use case for this is credit card and banking information.

The tool should automatically suggest when entered data should be marked private by using regular expressions or selectable field types to determine if the user has entered banking information.

The tool will allow for the uploading of semi-arbitrary media (e.g: images, PDFs and other documents).

Example user stories:

As a user, I should be able to freely enter data which is critical to my organization's continuity and/or disaster plans.

As a user, I should be able to categorize data I enter into this section of the Tool.



As a user, I should be able to identify data as private or that it requires a password.

As a user, I should be able to set the minimum permission levels required to view, edit, or delete a particular item in the Critical Data section.

3.1.6.a Dashboard

The dashboard is the user's focal center to their interfacing with the Tool

The dashboard serves to direct the user towards important areas of the tool by using intelligent copy and call to actions in order to create a funnel for the user's attention.

The dashboard will allow for dynamic notifications to either organization, community, or security alerts.

Example user stories:

As a user, I should be able to dismiss dashboard notifications.

3.1.6.b Dashboard (Enhanced)

The enhanced dashboard should feature 3 panels with information related to the organization's To Dos, completion of Readiness Assessments, and a Call-To-Action for accessing the Tool's Risk Insights.

The Enhanced Dashboard inherits all other functionality from the standard dashboard.

3.1.7 Guides & Resources

Guides and Resources contain a library of documents, templates, and guidelines that are both curated by the community and drafted for ad hoc purposes as they relate to preparedness and disaster recovery plans.

The Tool should implement an efficient search algorithm, such as an inverted-index, in order to make discovery of documents in the Guides and Resources very easy and based on terms entered by the user.

The Tool will use custom indices and metadata to identify which Guides and Resources are best suited for each user and organization type. These will be filtered so that they are the first available when users access the Guides and Resources view. This metadata will also influence the weight of any scoring applied when a user interfaces the search tool.

Example user stories:

As a user, I should be able to easily search the Guides and Resources section for information on multiple data points.



As a user, I should be able to star or favorite information I find useful.

As a user, I should be able to download documents from the Guides and Resources library.

3.1.8 Help

The Tool's Help section shall provide a knowledgebase for how to use and maximize value of the Tool.

The Help section shall provide Frequently Asked Questions (FAQs) to assist users.

It is recommended that a ticket system, or direct line integration to a support desk be provided.

3.1.9 Incident Management

This functionality allows the user to change an organization's operational status. There are 4 possible operating modes.

The operation modes break down from two categories; 1. Normal Operations, and 2. Active Incident.

The Active Incident operation has 3 options:

Monitoring; an incident is imminent - such as a natural disaster

Responding; the organization is currently responding to an active incident

Resolved; the organization has resolved an active incident

It is not necessarily expected that every incident will follow the 3 steps in sequential order. The tool should encourage organizations to use the "Resolved" operations to create reports on incidents postmortem. This encourages users to continuously re-evaluate their preparedness for such incidents and creates a more utility perception of the Tool.

The Tool shall provide the ability to update operational statuses from any page that has the "Change Status" link in the page header. Clicking the link launches the "Change Status" modal.

The "New Incident - Monitoring" form allows a user to name and describe the incident, and detail the locations and assets at risk. Additionally, when an incident is created, there is the potential to notify team members.

When clicking "Save", the user must validate creating the incident by using the confirm dialog.

3.1.10 Profile



Performing Arts Readiness Project Online Tools Development: Request for Proposals

Submission Deadline: January 5, 2018

User Profile

If a user changes their email, a validation email should be sent and then confirmed before the change is carried through to the database.

The Tool should send an email to the user when their profile updates are recorded noting that a change has been made to their account.

Example user stories:

As a user, I should be able to update my profile data, including my saved name, email, contact information, and title.

Password

The Tool should require users to input their existing password before a password change can be recorded.

The Tool should enforce the same password policy.

The Tool should send an email to the user when the new password is recorded noting that a change has been made to their account.

Example user stories:

As a user, I should be able to change my password.

3.1.11 Report Compilation

The Tool will provide a mechanism for exporting dynamically constructed reports.

The Tool should allow users to save their custom reports for easy access when performing exports in the future.

The Tool will save additional metadata with each report when they're saved, including the date it was created, last modified date, the original user which created the report, and any revision history associated.

The Tool will provide a way to export reports in PDF, and Microsoft Word formats. Additional format options may be defined as an supplement to this requirement.

Additionally, the Tool will also allow administrators to create and distribute standard reports to all users.

Example user stories:



Performing Arts Readiness Project Online Tools Development: Request for Proposals

Submission Deadline: January 5, 2018

As a user, I shall be able to select which sections from the plan and my organization's data I can combine to build and export a custom report.

As a user, I shall be able to easily select all sections when exporting a report.

As a user, I should be able to give each custom report a name when I create it.

3.1.12 Risk Insights

The Tool will provide risk insights into Flood, Crime, and Fire using a third-party integration such as Pitney Bowes' GeoRisk service.

The Tool will default to using the organization's location (saved in the account) but will also allow the user to override the location by inputting a zip code or address.

The Tool will use a reverse geoencoding service, like Google Maps, to translate physical location data such as an address or zip code to a specific latitude and longitude coordinate.

Example user stories:

As a user, I should be able to override the geolocation used to collect insight data.

3.1.13 To Dos

The Tool will provide users with the ability to track to dos or simple checklists to either continue building their organization's plan or for tasks the user wishes to record in the Tool.

3.1.14 Administrative Tools

Feature Toggling: As an Administrator, I should be able to turn on/off certain features to be free or paid (e.g., Emergency Checklist, etc.)

Index Management (Guides and Resources): As an Administrator, I should be able to modify and create indices for organizing and identifying the best target audiences.

3.1.15 Mobile Application

Login and Authentication: The mobile application should interface with the Tool's authentication mechanism just as the Tool's web application does. Login and authentication should be session based and use a secure token as the validator for a user's session. Commonly, this mechanism uses what is called a JSON Web Token (JWT). This functionality should also support the use of refresh tokens to keep user's mobile sessions alive longer and to create a better experience with the mobile application. Standard auth tokens should be expired no later than 5 days after issuance, and refresh tokens no later than 30 days.



Performing Arts Readiness Project Online Tools Development: Request for Proposals

Submission Deadline: January 5, 2018

Checklists: The mobile application should interface with the Tool's checklists. Checklists should be searchable and filterable.

Example user stories: As a user, I should be able to see all checklists, and items in each checklist on the mobile application.

As a user, I should be able to see items in checklists that are assigned to me.

As a user, I should be able to search through checklist items using full-text search.

Contacts: The mobile application should interface with the Tool's contact's list for the organization. Users of the mobile application will be able to sort, search, and filter contacts based on the classifications and hierarchies defined in the organization's profile on the Tool. Additionally any communication integrations will be native for the target device, meaning that the mobile application will default to the device's native email, phone, and text message applications (or their in-app integrations) and not implement their functionality as part of the mobile application's feature set.

Example user stories:

As a user, I can view, search, and sort the available contacts in my organizations profile from the Tool.

As a user, I can email, call, or send text messages to contacts using my device's native clients.

3.2 Usability and Accessibility

3.2.1 Graphical User Interface

The software shall provide a uniform look and feel between all the web pages.

The software will have a responsive design and be tested for accessibility on multiple screens that comprise an adequate average of all currently available resolutions.

The software shall contain a simple, intuitive, and mobile friendly navigational menu.

3.3 Reliability and Availability

3.3.1 Back-end Internal Computers

The software shall provide for replication of databases to block based storage locations as its standard redundancy policy.

The software shall provide an elastic block storage solution for its main file system. Any assets used in the software (e.g. images, stylesheets, markup files, etc.) should be stored in block storage.



3.3.2 Internet Service Provider

The software shall be hosted with an internet service provider who can provide 99% availability or more through their network facilities onto the internet.

3.3.3 Cloud Services Provider

The software shall provide a contractual agreement with a cloud services provider which can provide a suitable subset, if not all of the following services and resources: cloud compute, databases, virtual networking, block storage, and caching.

3.4 Non-Functional Requirements

3.4.1 Performance

The product shall be based on the internet and must be run from a web server. Exceptions can be made if the developer chooses to decouple the client and server. In this case the client can be served over static file sharing, or a content delivery network (CDN).

The product shall take initial load time depending on internet connection strength which also depends on the media from which the product is run.

The performance shall depend upon hardware components of the client/customer.

3.4.2 Security

3.4.2.1 Data Transfer

The software shall use secure sockets in all transactions that include any confidential customer information.

The software shall automatically log out all users after a period of inactivity.

The software shall not leave any cookies on the customer's computer containing any of the user's confidential information.

3.4.2.2 Compliance Restrictions

The software will employ any techniques, operations, or added functionality needed to maintain compliance with any compliance requirements which befall the software given its defined functionality, or any future enhancements or modifications to the software, or new subscriber markets the software may be opened to.

3.4.2.3 PCI Compliance

The software will take accurate and effective measures to maintain compliance with the PCI DSS regulations if it is ultimately determined that such compliance is required.



Performing Arts Readiness Project Online Tools Development: Request for Proposals

Submission Deadline: January 5, 2018

Currently, it is reasonable to assume such compliance would be required by the software, due to the functionality that allows users to store credit card information in the system. Storing banking information is not governed by the PCI Security Council - but this information is considered highly sensitive and using the PCI compliance guidelines as a metric insures proper handling and storing of such data.

3.4.3 Data Storage

The customer's web browser shall default to echoing a user's password with special characters representing typed characters.

The customer's web browser shall never display a customer's credit card number after retrieving from the database. It shall default as being shown with just the last 4 digits of the credit card number. To see the remaining numbers, a user must re-enter their password, even if they're already logged in.

The system's back-end servers shall never display a customer's password. The customer's password may be reset but never shown.

The system's back-end servers shall only be accessible to authenticated administrators.

The system's back-end databases shall be encrypted, and any backups of said databases should be encrypted at rest.

3.5 Supportability

The source code developed for this software shall use the latest major version of any language and/ or framework selected. In addition, any relevant and timely security patches will be in place, and production environments will be up to date upon release and to the best of developer's knowledge.

3.6 Design Constraints

3.6.1 Web and Mobile Based Products

There are no memory requirements. User's computers or mobile phones must be equipped with web browsers. The product must be stored in such a way that allows the client easy access to it. A general knowledge of basic computer skills is required to use the product.

3.7 Documentation

Documentation pertaining to how the software is constructed and organized shall be provided in addition to insuring that source code is adequately commented and files contain the appropriate header per the standards of the programming language and/or frameworks used in development of the software.



Performing Arts Readiness Project Online Tools Development: Request for Proposals

Submission Deadline: January 5, 2018

Documentation should be available in HTML, PDF, Microsoft Word, or any other reasonable format if requested by any of the Performing Arts Readiness project stakeholders.

3.8 Interfaces

There are many types of interfaces as such supported by the software system namely; User Interface, Software Interface and Hardware Interface.

The protocol used shall be HTTPS. The Port number used will be 443.

There shall be logical address of the system in IPv4 format and secure access over the SSH protocol may be required. We recommend that a private network be implemented, that creates a VPN connection for anyone accessing the system over SSH. The SSH port will be 22.

3.8.1 User Interfaces

The user interface for the software shall be compatible to any browser such as Internet Explorer, Mozilla Firefox, or Google Chrome, by which user can access to the system. Browser support should be constrained to include the current and single prior major release.

The user interface shall be implemented using common HTML for markup, CSS for styling, and Javascript. It will not contain any Flash components, unless they're used specifically for integration with the clipboard functionality of the user's desktop operating system. It is expected that any inclusion of Flash will have a smooth degradation for mobile browsers.

3.8.2 Hardware Interfaces

There is no additional hardware interface required to use the software. Since the application must run over the internet, the only requirement is a standard internet connection provided by either wired or wireless hardware which the user should already possess.

3.8.3 Software Interfaces

The software shall communicate with a content management system to administer users and organizations, and provide super user access to billing and for support.

The software shall communicate with a merchant service system to identify available payment methods, validate, and process payment.

The software shall communicate (or provide the ability to integrate) with a CRM system to provide support.

The software shall communicate with Pitney Bowes GeoRisk and Geo911 APIs.

The software shall communicate with a geo-encoding service such as Google Maps.



The software shall communicate with a third-party provider for Push Notifications.

3.8.4 Communication Interfaces

The software system shall use the HTTPS protocol for communication over the internet and any intranet communication will be through TCP/IP protocol suite.

3.9 Licensing Requirements

There is no current licensing required.

3.10 Legal, Copyright, and Other Notices

The software shall display the disclaimers, copyright, word mark, trademark and product warranties as required by law or in accordance with any agreements or licensing terms.

3.11 Applicable Standards

Shall be as per industry standard and extend any inherited standards of the language, framework, or platform upon which the software or its components are being developed.

Special Considerations

Data Migration from Existing Systems

It is the intention of the collective stakeholder group to migrate data and user accounts from both the dPlan and ArtsReady platforms so that users can transition smoothly to the Tool.

Although additional data points may be required after further study of the respective data models for each system, initial planning should focus on migrating user and organizational data. It is expected that some mutation of the current data models will be required to match the modeling and relationships in the Tool.

An additional onboarding step will be required to properly introduce existing users to the Tool.

The Tool will not store old passwords (where applicable) for existing users. New passwords will be required and prompted during the onboarding process of the Tool. Additional checkpoints may be required to validate the identity of existing users.

The Tool will not store any payment information for existing users.

Branded Login and System Views

Since the Tool is consolidating user bases for both dPlan and ArtsReady, the collective stakeholders have decided to maintain branding for each platform, but use one base for the Tool. Steps should be taken so that the Tool's interface can dynamically adjust to represent either dPlan



**Performing Arts Readiness Project Online Tools
Development: Request for Proposals**

Submission Deadline: January 5, 2018

or ArtsReady, and users and organizations of the Tool should be classified as belonging to one base or the other.

Data Import/Export for Special Use Cases

The tool may require an especially designed system for handling data for entities that are not allowed (by policy or governance) to store their data in third-party applications or services. For this, a unique data transmission protocol will be required and will involve additional analysis to define.