Call for Webpage Proposal for CALACS

The Canadian Association for Latin American and Caribbean Studies (CALACS), whose official languages are English, French, Spanish, and Portuguese, was founded in 1969 with the following purposes in mind:

a) To facilitate networking and information exchange among persons, in Canada and abroad, engaged in teaching and research on Latin America and the Caribbean;
b) To foster, especially within Canadian universities, colleges, and other centers of higher learning, the growth of information on and interest in Latin America and the Caribbean; and
c) To represent the academic and professional interests of Canadian Latin Americanists and Caribbeanists, and
d) To build awareness about the value of CALACS in Canadian, Latin American, and Caribbean academic and policy-making arenas.

Considering that CALACS is:

- Positioning itself as the premier organization in Canada regarding Latin American and the Caribbean issues,
- Facilitating networking and information exchange among scholars, researchers, and policy makers in Canada and abroad, and
- Looking to increase our membership,

What we need

it requires a new multilingual website that, depicting a professional and highly attractive interface that privileges both functionality and a powerful design, is easy to navigate and maintain by a staff without the need to employ specialized services to make changes. Thus, staff need to be able to easily add and revise text, photos, and all other pages as necessary in the four official languages.

Re CMS

Moreover, since CALACS is a not-for-profit organization with limited economic resources, it is imperative that the proposal suggests a robust Content Management System (CMS) that, even if technology changes continuously, can be used for a period of at least five years (CMS upgrades are a possibility if included in the initial budget). Acquiring a robust CMS will also help CALACS to avoid the need of acquiring additional software in the future, save website revision costs, and ensure that the website stays fresh and up to date over time. The ideal proposal will include ongoing hosting and costs to maintain the site through security patches and other updates.

Re functionality We have identified the following requirements for specific site functionality: ability to replicate the website in CALACS' four official languages, compatibility with multiple platforms and devices, browser optimization, to have a search function, a news widget, a newsletter sign-up (MailChimp), a Twitter timeline, a map widget for the annual Congress page (with ability to change the location of the congress each year), a blog, videos and podcasts, media icons (LinkedIn, FB, and Twitter), and search engine optimization (Google, Yahoo, and Bing). Images you may use for the webpage need to have a free content licence and/or be free of charge, such as Creative Commons BY-NC or BY (e.g. images obtained from Unsplash or some from Flickr).

Re CRM Currently, we use CiviCRM hosted on a Drupal site as our Contact Relationship Management (CRM) system for membership registrations and renewals, but the adoption of another CRM is a possibility if it is open source software or the fees for software upgrades and data transfer are minor. A smooth pairing between the CRM and the CMS is expected.

Re back-end CALACS also requires the ability to offer our members, using a streamlined and functional interface in a secure environment, the possibility to acquire and renew memberships and to register for our congress selecting from different fee categories (and respecting the rule that only those registered as members can register for congress). The CRM must also allow for the automatized sending of membership renewal reminders by email and permit members to update their addresses and other information by themselves when needed. The membership and conference registration forms and address update option need to be contained in a Members-only area. The CRM also needs to offer the possibility to generate different administrative reports by staff based on membership types, month of registration, country, institution, etc. Further details of the reports needed will be provided at the consultation phase. Data transfer from our current CRM to a potential new CRM, if needed, should be contemplated in the budget. The signature of a confidentiality agreement to protect the data privacy of our customers is a requirement.

In addition, we require a conference proposal submission system. The system needs to offer our membership the possibility of submitting an Individual Paper, a Panel, or a Workshop proposal. For the Individual Submission page, we need the following fields: Session Track (this is a general theme under which the paper will be requested to be considered, so staff needs to have the ability to create the list of session tracks), Title of Presentation (no more than 15 words and initial caps only, that is, not all in capitals or all lower-case), Abstract (no more than 250 words), and Institution or University. Also, once the submission button is pressed, the submission needs to be sent to a specific email to be determined each year. Regarding the options for Panel or Workshop, the following fields are needed: Title of Panel or Workshop (no more than 15 words and not all in capitals or all lower-case), Abstract (no more than 250 words), Name of Chair, Name of Discussant, and, for a maximum of 5 participants: Name of Participant, Title of Presentation (limit to 15 words using initial caps only), and Abstract (maximum 250 words per paper). Again, once the submission button is pressed, the submission must be sent to a specified email, and a message confirming the successful submission needs to be presented to the sender.

We also require submission forms for our awards and journal pages. The journal submission form will need to include five fields for demographic data (i.e. First name, Last name, Institution, Country, and Email), an either/or button or a scroll down menu for type of submission (i.e. Article

or Book Review), and the attach document function box. Depending on the type of submission (i.e. Article or Book Review), it would need to be sent to a different email. In the case of the Awards submission page, the form will need to include five fields for demographic data (i.e. First Name, Last Name, Institution, Country, and Email), a scroll down menu (including Graduate Essay Prize, Outstanding Dissertation Prize, Distinguished Fellow Award, Best Article Award, Best Book Award), and the attach document function box. Depending on the type of submission, the message may need to be sent to different emails. A message confirming the successful submission of the proposal needs to be presented to the sender.

From time to time, we offer <u>student funding</u> to attend our conference based on our budget, thus, a similar submission system needs to be included containing the following fields:

1. First Name
2. Last Name
3. Email
4. University or Institutional Affiliation
5. Country from which you are applying
6. Street Address
7. Street Address Line 2
8. Street Address Line 3
9. City
10. State/Province
11. Postal Code
12. How much do you anticipate spending on local accommodation (hotel or residence)?
13. How much do you anticipate spending on airfare?
14. How much are you requesting in financial assistance?
15. Do you anticipate being able to participate in the conference if you are not offered travel assistance? (add Yes/No buttons)
16. Are you applying to the conference as an individual presenter or as part of a pre-organized panel? (add Individual presenter/Pre-organized panel buttons)
17. Are you the organizer? (add Yes/No buttons)
18. If not, what is the name of the organizer of your panel?
19. What is their email address?
20. What is the title of your panel?

We also require an internal <u>elections and motions system</u>, where our members can submit candidacies by certain deadline, and our general membership can cast their vote from the pool of candidates and/or vote on certain motions. For our elections page, we need the following fields: Election Title, Start and End Date and Time (using a calendar widget), Information box (i.e. background information), Instructions box, and fields for adding candidates. We also need the ability to set up an election choosing a single candidate or various candidates at once, depending on the type of election (e.g. 3 out of 4 candidates), present candidates in a random order once the voter logs in into the voting system, allow for an abstention option, as well as the ability to create profiles for each voter that include Name, a text box for the candidacy Proposal, and a Picture. For Motions, we require the ability to add a Question per item being voted on and its respective answers: In favour of the motion, Against the motion, I abstain from the motion. Once the voter has chosen her options, a confirmation message needs to be generated, showing her the chosen options and allowing to either submit the vote or to change the choice. Once the voter has cast her vote, she cannot modify her choices. The system also needs to offer the ability to

automatically send scheduled voting reminders to members who have not casted their vote before the election/ motions process closes. The Elections Officer must not know which member voted for which candidate(s) or her/his particular choice in the motion voting process, but s/he needs to know how many and which voters have not casted their vote yet at certain point in time before the election closes. Also, the system needs to automatically close the election based on the date/time provided at the moment of the elections configuration. Once the election is closed, the system needs to generate the results and be accessible by the Elections Officer only, indicating the number and percentage of votes generated, the number of votes for each candidate in the election, the number of nays, yes, or abstentions in the case of motions, and which members did and did not cast their vote.

We also make use of online fora from time to time. Our last forum was made with Drupal modules and the front-end with CSS, PHP, jQuery, and JavaScript. We thus need access to a forum platform where our members can easily sign up for a particular forum from the Membership Area based on their unique Membership ID (or sometimes without the need to be a CALACS member), as well as be able to collaborate, exchange documents, and have a tracked record of their interaction. The forum needs not to be coded or developed as part of the website, thus it can be part of our pre-existing forum platform adding some cosmetic tweaks or it can come from an outsider provider and integrated into the front-end webpage. We favor a forum platform that is easy to understand and use by people unfamiliar with this technology, as well as a platform that can offer diverse functionality. For example, we require that the moderator needs not to approve each forum member registration, but one in which once a member signs up, s/he has the ability to immediately join the forum and create posts, or, if needed, to switch the function and only allow the moderator to authorize members to join a particular forum.

For the News page, the needed list of attributes per item would be: headline, subhead, byline (i.e. name of author and publication date/time), and body text. The option to add images is also required (the webpage architecture and the content classes we require are attached at the end of the document).

For the Donations page, we need the following fields: Contribution Amount, First Name, Last Name, Email Address, Organization (field not mandatory), Preferred use of donation (with a scroll-down list with the following options: General Fund, Student Travel Award (to attend congress), LAC Region Travel Award (to attend congress), and CALACS prizes (e.g. Outstanding Dissertation Award)), and Payment Method (with a scroll-down list with Card, Paypal, Cheque). The Donations page would need to be connected or re-directed to a secure page in order to access the CRM and allow for the secure processing of the donation.

Re managed hosting — Since we own the domain https://www.can-latam.org/ and we automatically renew the payment, it is not necessary to include this item in the budget of the proposal. However, we are looking forward to seeing suggestions in your proposal for managed hosting (i.e. a management network, automatic and manual backup, firewall, patches and updates), monitoring, and support for the CMS/CMR chosen. The server and personal members data need to be located in Canada. We are also looking for details regarding revisions of the proposed website design and on-line training for staff in the use of the proposed CMS and CMR, details about a website mirror for beta testing purposes, debugging, as well as post-launch technical support. Overall, the back-end needs not to be composed of a purposefully coded or built-up single system. That is to say, it can

be constituted by different products under a single front-end if a smooth interaction among products is assured.

Re budget

The ideal budget will include the initial costs of setup and design, as well as ongoing annual costs for hosting and keeping the back end up to date with appropriate security updates, and will consider our non-for-profit status, which can also grant significant discounts for the acquisition of software and other services. Please include with your proposal your detailed estimated project costs and a link to your portfolio no later than **September 11, 2017**, and send it to **alejandro.hernandez(at)carleton**.ca with the subject line: CALACS web proposal. We already appreciate your interest and time spent on your submission. Unfortunately, we will only be able to contact those who were pre-selected.

Kind regards,

Alejandro Hernández
Co-Chair of the Communications Committee, CALACS
Carleton University

Webpage architecture suggested