Request for Proposals to Upgrade MassLegalServices.org from Drupal 7 to Drupal 9

Introduction

The Massachusetts Legal Aid Websites Project ("Websites Project") seeks responses from consultants to move the MassLegalServices.org website ("MLS") from Drupal 7 to Drupal 9. The Websites Project is a part of the Massachusetts Law Reform Institute, a nonprofit legal services organization that provides statewide advocacy and leadership in advancing laws, policies, and practices to secure economic, racial, and social justice for low-income people and communities.

Scope of work

Background

The Websites Project manages www.masslegalservices.org, a statewide website with information and resources for attorneys, advocates and staff working in Massachusetts civil legal aid.

MLS serves as the statewide collaboration resource for legal services and poverty law advocates in Massachusetts and includes an extensive online library with thousands of pieces of legal content created in the past 15 years in over a dozen subject matters. The site, which currently runs on Drupal 7, also hosts Mailman email discussion groups in a variety of subject matters relevant to legal aid and poverty law practitioners. Almost 1000 people from more than 20 programs have full site membership, with hundreds more having more limited access to the library

In upgrading to Drupal 9, we would like to maintain essentially the same architecture, look and feel of the site, while also taking the opportunity to incorporate improvements that come with Drupal 9 into our site.

We use Linode (www.linode.com) for hosting.

Deliverables

Detailed project specifications and functions can be found in Appendix A. However, in general, the consultant must deliver a fully functioning, responsive, secure Drupal 9 website that implements UI/UX best practices including but not limited to use of WCAG 2.1 guidelines and is 508 compliant.

Other key elements are as follows:

- The site relies heavily on user generated content which is reviewed by volunteer editors, so ease in content contribution and a streamlined workflow review process is critical.
- Our library has thousands of pieces of content. Therefore, the library search and filtering of results must be robust.
- Much of the content is password protected. We have implemented complex permissions which we need to retain. These permissions use both roles and groups to determine which types of content, and which categories of content, users can access.
- Our users rely heavily on email lists, which are currently in Mailman. Membership in these email lists is managed primarily through the MLS website, and users have access to the archives through MLS. We need to maintain a similar system in the upgraded site.
- We would like to integrate Google Analytics directly into the upgraded site, so that editors and administrators can easily track usage.
- The consultant will need to migrate the content from the Drupal 7 site to the Drupal 9 site.
- The consultant will need to create and maintain technical documentation.

Timeline

RFP released – Wednesday, November 4, 2021
Responses due no later than 5 pm EST, Wednesday, December 1, 2021
Successful vendor announced – Monday, December 13, 2021
Contract signed and work commences – Wednesday, December 22, 2021
Work completed no later than June 30, 2022

Proposal Elements

Proposals should be sent electronically with the subject line "Proposal for MLS Upgrade" to breichart@mlri.org no later than 5 pm EST on December 1, 2021 and should include:
- An executive summary of the proposal
- A detailed overview of the proposed approach to carrying out the project

- A proposed budget
- Information about the consultant's background, capabilities, and related experience
- A summary of projects for clients in the legal domain and in the non-profit, court, or government realm
- Two references from previous, related projects

Vendors should allow enough electronic delivery time to ensure timely receipt of their proposals by the RFP Coordinator. Vendors assume the risk for any e-mail delay problems.

For More Information

Please contact Brian Reichart, Attorney, Massachusetts Law Reform Institute via e-mail at breichart@mlri.org. All questions must be received prior to the response due date and time listed in the Timeline above. Written questions are preferred and should be submitted by email to ensure receipt and timely response.

RFP evaluation

MLRI's Evaluation Team will evaluate the responses to this RFP. Evaluation factors will include, but are not limited to, prior experience, including experience with the legal aid environment, prior work samples, cost proposals, timeline, methods of project management and client references. The Team may also consider past contract performance and check references beyond those listed in the vendor's response.

Additional RFP administrative provisions

Costs of Preparing Responses: MLRI will not pay any vendor costs associated with preparing responses submitted in response to this RFP.
Responses Property of MLRI: All responses, accompanying documentation and other materials submitted in response to this RFP shall become the property of MLRI and will not be returned.
RFP Amendments/Cancellation/Reissue/Reopen: MLRI reserves the right to change the RFP Schedule or issue amendments to this RFP at any time. MLRI also reserves the right to cancel or reissue the RFP.
Minor Administrative Irregularities: MLRI reserves the right to waive minor administrative irregularities contained in any response.
Inability to Enter Contract: MLRI reserves the right to eliminate from further consideration any vendor that MLRI, because of legal or other considerations, is

unable to contract with at the time responses are due in accordance with the schedule contained in the Timeline above.

No Obligation to Enter a Contract: The release of this RFP does not compel MLRI to enter any contract. MLRI reserves the right to refrain from contracting with any vendor that has responded to this RFP whether or not the vendor's response has been evaluated and whether or not the vendor has been determined to be qualified. Exercise of this reserved right does not affect MLRI's right to contract with any other vendor.

MLRI reserves the right to request an interview with any vendor and/or a demonstration from any vendor prior to entering a contract with that vendor. If a vendor declines the request for an interview or demonstration for any reason, the vendor may be eliminated from further consideration.

Multiple Contracts: MLRI reserves the right to enter contracts with more than one vendor as a result of this RFP.

Non-Endorsement: The selection of a vendor pursuant to this RFP does not constitute an endorsement of the vendor's services. The vendor agrees to make no reference to MLRI in any literature, promotional material, brochures, sales presentations, or the like without the express written consent of MLRI.

Contract Payment Limitations: Vendors should anticipate payment at the end rather than the beginning of the invoice period in which they provide services or after they submit any deliverable for which a payment is due.

Conflict of Interest: By submitting a proposal, contractors acknowledge that they and their affiliates have no undisclosed conflicts of interest.

Appendix A

The MLS website currently contains the following sections and functionality that we would like to maintain. Specific desired enhancements that we would like to accomplish as part of this upgrade are also noted. This list is not exhaustive, and there may be other features that are part of the current site that we would like to preserve.

As a baseline, the site must be responsive for all devices and for the most recent versions of commonly used browsers (including Chrome, Safari, IE, Firefox, Edge) and implement UI/UX best practices including but not limited to use of WCAG 2.1 guidelines and is 508 compliant. The site must also be fast and optimized for SEO. It should meet or exceed industry standards for security.

The consultant will also be required to design and implement a content migration strategy, and to provide technical documentation.

Library

The heart of the website. It is currently organized into 24 top level issue areas which we call Practice Areas. Content within each Practice Area is organized by taxonomy terms, which site administrators can manage. Some of the Practice Areas are associated with Drupal groups. Access to library content is controlled by a combination of roles and groups. We require a robust search and the ability to filter results using a variety of factors.

Site members can add library items by filling out a form. Alternatively, they can email content to the library, and a draft library item is automatically created based on the contents of the email. Library content submissions from site members are reviewed by editors prior to going live on the site.

Library content can include nodes (the "library item" content type) that are primarily html articles. It also includes nodes that are primarily links to other websites, embedded videos or that have pdf or word attachments. The attachments are currently indexed and are returned as part of site search. Note that the attachments must follow the same permissions as the node that are attached to.

Users can currently print, download and email library content, and, in certain cases, share to social media. Site members can also "bookmark" content to their own account. Site members can also "tag" content, which is also used to filter search and browse results. We need to preserve this functionality.

Desired enhancements

Improved workflow for editors

We currently have three workflow statuses for library item content -- Draft, Distributed and Archive. However, we currently do not have the ability for an author or editor to work on revisions to a library item prior to "Distributing" it. At a minimum, we want to add this feature, as well as the ability to track revisions.

Other enhancements to the workflow process to make it easier for our volunteer editors to manage the content review process are desirable.

Integrate Google analytics into library items and views

We also want to integrate Google analytics directly with library items and views so that editors and admins can see what content is being viewed.

Integrate book content with the library

We currently have Drupal "books" that are a separate content type and not searchable form the library. We would like to integrate this into the library. Also, most of our "books" are based on content that is created using Microsoft Word. Improvements in importing Word content into the "books" would be a plus.

Enhanced search

We want to improve the search so that it returns fast and accurate results that can easily be evaluated by our users. Currently we use Apache Solr.

Group Space

Similar to google groups, These spaces are currently associated with Mailman Email lists. Group members can add calendar items, announcements, and create workspace documents that appear in the group space, rather than the library.

Desired enhancement

The group workspace document is clunky to use and doesn't function as a true "wiki". Enhancements so that it can more easily be used for group editing is desirable.

Calendar

For listing meetings and trainings of interest to site members. The ability to view calendar items depends on a combination of role and group. Users can currently add a calendar item to their personal calendars as well.

Announcements

Site members can submit announcements of interest to the community. The ability to view announcements depends on a combination of role and group.

News and Blog

Currently, each site member has the ability to have a "blog". We do not need to keep this feature for every member. Similarly, currently each Practice Area has RSS feeds from external sources associated with it. We do not need to keep this feature either.

Desired enhancement

We currently use the Blog content type to publicly publish the contents of certain email lists. Right now, this requires us to copy the email, paste it into the Blog and edit the format before publishing. As part of the upgrade, we would like to make it easier to accomplish this task.

Staff Member Content Item, Directory and Search

Staff of certain organizations have full membership to MLS. These staff members are added to and removed from the MLS website by an MLS program administrator from each of the designated organizations. Contact information for each of these staff members, as well as information about the organization, is available through views on MLS, as well as through a staff directory search.

We need to maintain the ability to manage membership in the site through the MLS program administrators actions. (Note that these "program administrators" are not the general administrators of the site and have far fewer permissions.)

Furthermore, select third parties must be able to easily export information about the staff members through csv files.

Email Lists

We have over 50 active email lists, which are currently managed through Mailman. The majority of these Mailman email lists are associated with a Drupal group. Membership in these associated email lists is managed through the MLS website group function. The Mailman email

list archives are linked in the Drupal group spaces. Moderators of the Mailman email lists have a single sign in to Mailman and the MLS website, so they can moderate stopped messages as needed.

In addition to the associated email lists, we have certain stand alone email lists that are administered directly in mailman.

Site members can currently subscribe and unsubscribe to email lists on their own, through a view in the MLS website. We need to preserve this functionality.

Newsletter

We do not currently create newsletters directly in MLS. We do use Mail Chimp for certain newsletters. Also, as mentioned above, certain email lists function primarily as announcement lists and the emails are then manually added to MLS.

Desired enhancement

The ability to create attractive, nicely formatted newsletters through MLS, that could then be distributed through our email lists, and also archived on the MLS site, would be a plus.

Google Analytics

We currently have Google Analytics set up to track website metrics. This will need to be redone for the upgraded site as well.

Desired enhancement

Integrate key metrics into the site itself to make it easier for editors and admins to assess content on an ongoing basis.

Views and Reports

We use views extensively to manage content, keep track of users, and create reports. These will need to be rebuilt for the upgraded site.

Webforms

We are currently using webforms to manage training registrations and for surveys, and would like to keep doing so. We anticipate being able to use webforms for other functions as well, so this will need to be included in the upgraded site.

Site members

Site members must be able to easily contribute content to the site including library items, announcements, calendar events and announcements. They must be able to easily sign up for email groups through the site, as well as unsubscribe from lists through the site. Site members can currently "bookmark" key content to their MLS account; we want to preserve this functionality. Also, site members can currently view recent posts and site contributions from their account; we want to preserve this functionality as well.

Contact Form

Users can contact site administrators through a contact form. Currently, these forms are forwarded by email to specific admins. We need to keep or improve this functionality.

Permissions

Although referenced in various sections above, we want to underscore that we need to be able to control access to content, including attachments, in a very granular manner that nonetheless does not require us to do so on a per node basis.   Certain items are viewable by the general public. Some items are viewable by all site members. Other items are only viewable by certain site members based on role or group membership. We need to maintain this functionality in the upgrade.