Innovation Summit website spec RFP

April 12, 2013

The Innovation Summit will take place at the end of July 2013 in Santiago, Chile. The goal of the website is to provide an accompanying Before-During-After website presence which can facilitate the attendees of the summit to meet each other, share information, provide them on-line and in-person tools during the summit and create a followup/after the fact series of conversations and on-going relationships and followup action items after the summit.

This website spec is broken up into three distinct deliverables and time frames - given the urgent need for a website presence by May 1st, 2013 and final completion by the second-third week of July 2013.

**Phase I - by beginning of May 2013**

**Simple site** - members come to the site - register - answer a few ‘sign-up’ questions.

New members can then see the names of other attendees of the Summit. The site’s content will include basic Summit info (2 day conference), the current planned agenda and text - describing the purpose and goals of the summit - in both English and Spanish.

At this Phase I point - the site should also include a few photos from previous summits and be tightly integrated with the main Institute for Large Scale Innovation website “<http://www.largescaleinnovation.com/>”



Ideally this website will “hang off of” the Large Scale Innovation website via matching HTML and CSS - and provide website visitors a seamless integration between the two sites.

All conference fees and attendee ticketing will be handled separately. This site is strictly a content and community site.

The site should also include an embedded video of workshop John Kao gave in Santiago back in April 2012.

This site needs to be in Drupal, Joomla or Wordpress - as backend admin needs to be handled by non-technical staff. Attendee management, content updating, program updating, archival pages and photos - will all be requirements of the Phase I deliverable.

Main website design will be provided by client (ideally matching the mother - the Large Scale Innovation website.) Photoshop layered (.psd) artwork will be provided to vendor, along with a site map and all content. Vendor will be expected to take the artwork, create a website and host that website.

**Phase II - July 1st**

At the appropriate time (mid-late June 2013) a **fully featured** version of the site will be turned on which will be divided up into three distinct areas:

* + - Before
    - During
    - After

**Before** - this section is fundamentally the Phase I website. Attendees will have to answer a few registration questions, be able to view the planned program agenda and submit questions to be considered (during the summit).

Website members (summit attendees) will also have the ability to upload and share white papers and documents of all types - which would all be entered into a master ‘archive.’

**During** - a series of on-location tools and techniques will be made available to attendees via the website - to be used during the summit. Some of these tools enable attendees to post their comments into a “backchannel” (which will be displayed during the summit.) Other tools enable attendee polling (both from their laptops, but also from their tablets and smartphones.) Still other tools are for ‘transcribers’ to utilize to ‘facilitate’ the summit itself, at which point those transcriptions will be posted onto the site.

In addition to the on-line tools provided to the attendees, certain kinds of collaborative and interactive activities and techniques will be deployed during the summit - to facilitate inter-attendee communication and collaboration. These tools and activities will be explained to attendees – at the beginning of the summit.

Attendees will fill in their own on-line profiles - providing bio, areas of interest, professional CV, interests and other materials that will properly represent their role as stakeholders in the summit.

**After** - (hopefully) a series of on-going conversations and on-line discussions will arise out of the result of the summit. These topics and interactive/persistent conversations will be facilitated on an on-going basis via the ‘after’ section of the web site.

Recordings and proceedings from the summit - will be uploaded and added to the website archives. Whatever scribing and annotation that had been displayed during the summit will also be archived and made available as well as a written report on the summit’s proceedings and outcome.

Each website member (summit attendee) will be assigned a simple profile page - to display their white papers, inks, documents, etc. - and their answers to the questions poised at registration.) Attendees face (image) and interests/background will also be ingested and included on their profile page. A facewall of all attendees will also be an available feature.

The ‘after’ website will also be open to the general public, with the original summit attendees having password protected access to certain content sections of the website.

**Phase III - ~July 22nd**

The final phase of this project will commence at least a week before the summit (in Santiago, Chile.) The final version of the site will be turned on - which will include support for activities and tool downloads “during” the summit, as well as all the followup and “after” features and functionality.

This final version of the site will have had content added and the site has been ‘tweaked’ for performance. This content will include the display of the questions being submitted by attendees and any answers to those questions. Attendee’s white papers will also be displayed. An up-to-date program agenda, on-going enlargement of the attendee list and additional archival materials (*eg.* representing the history of the i20 effort) will also be included in this final site.

Specific polling and backchannel tools (to utilize during the summit) will be made to all attendees via a ‘Tools download’ section of the site. If possible accompanying smartphone or tablet polling apps will also be included and configured. Instructional materials and tutorials will also be provided to help in the proper operation of these tools. Wherever possible all content ingestion will be facilitated by website admin (provided by client) with basic training and support available from the vendor.

Special sections of the site will be made available ONLY to ‘inner circle’ members of the website. This whitelist will be determined manually - by a backend tool.

Other special technologies will also be made available to summit attendees; including (pending) free laptops, Chromebooks, Surface tablets and/or some other kind of tablet device. Multi-screen displays, live meeting facilitation and an active meeting ‘scriber’ will be taking notes and annotating the summit’s proceedings.

**Interactive experience during the summit**

The goal of this website is to enable a highly interactive and collaborative summit - whose success and momentum will carry itself into an “after” phase - where issues and conversations continue to be discussed.

To ensure this success, the website must be a clean - simple - informative site which provides timely and relevant info on speakers and panelists, ties audience members (attendees) into the live summit and educates attendees as to the potential of on-line interactive summits being coupled to ‘real-world’ summits.

**Website spec (through 4 phases)**

**Phase I website**



**Home**

Description of Summit, John Kao embedded video (which is a documentary of a workshop put on by John Kao (in Santiago, Chile) in April 2012), links and description of the ILSI i20 effort, images and description of venue in Santiago, Chile, list of top speakers/attendees.

**Program**

Tentative Program agenda - two day conf, as well as one-day workshop. Description of the summit’s planned panels, speakers and the Executive program (which is a separate one-day workshop.)

**Attendees**

Current list of all attendees registered for the summit. Clicking on attendee’s name will send website visitors to a short profile page for that attendee, listing their affiliation, role, background, bio, related links and answers to the questions poised at registration.

**Archives**

Submitted white papers, documents, etc. from attendees.

**About/Contact**

Basic descriptive info on the i20 and the summit and workshop. Basic contact info for i20 staff and stakeholders.

**Register/LogIn:**

Traditional website registration and login - with a few key questions poised to all registrants. Those answers are then compiled and displayed on each attendee’s profile page.

**ILSI website integration:**

This website should be seamlessly integrated with a mother website the “Institute for Large Scale Innovation” <http://www.largescaleinnovation.com/> (matching HTML, etc.) Various levels of ‘membership’ will control access to key private pages. Those membership levels will be controlled manually via a backend tool.

**Phase I back-end tools**

**- Membership management**

All website members can be managed (edit, delete, notify) as well as whitelist inclusion supported. Members can also be manually registered.

- **Program and agenda content**

The summit’s program and agenda can be created and updated. Links, Photos and/or Videos will also be supported.

**- Archives content**

Documentation and proceedings from previous summits will be displayed in the archives. In addition - white papers and documents submitted by attendees will also be displayed. All of these materials must be managed by this backend content management tool.

**- Registration question results**

Each new member will be asked a series of questions and those answered collected by the website. This backend tool must be able to define those questions. All answers will be displayed on the members profile page as well as tabulated and displayed in this backend tool.

**Phase II website**



Somewhere in the mid-June 2013 time period this website will have completed its key features set and enhanced several areas of the Phase I website and be ready to be pushed live (completing the Phase II development time period.) This updated website will now include a section for downloading software tools which will be utilized during the conference.

Additional features and functionality will also be nearing completion - but NOT pushed live (Phase III) until one week before the summit (circa July 22nd, 2012.)

Additional and enhanced features exposed - at the Phase II timeframe:

**Home:**

Related news items could be added to the Home page.

**Program:**

The Program guide will now include speaker’s bios,

**Tools:**

A page of software tools (available to be downloaded) will be made available via the website.

**Archives:**

The Archives will now include additional white papers, documents and background materials surrounding the ILSI and it’s i20 efforts. The history of the i20 will also be added to the Archives section

**MyProfile**

Profile page - for each member/summit attendee – displaying their profile information.

**Phase II backend tools**

- **Program and agenda content**

This tool will be enhanced to support adding speaker’s bios and links - associated with specific program agenda info.

**Phase III website**



The final pre-summit version of the website will be made live on July 22nd, 2013. This version will include the final-final Program, some enhanced features, a couple of additional features and be the site utilized ‘during’ the summit.

Additional and enhanced features exposed - at the Phase III timeframe:

**Home:**

The Home page will be enhanced with initial analysis and display of the answers given by registrants at the time of their registering with the website. This article will be displayed in a key (above the fold) area of the Home page. Comments will be able to be left on this analysis article.

In addition a backchannel widget will be displayed on the Home page - displaying what is being “communicated” in real-time during the summit.

A Help button will also be added to the Home page - in case any attendee needs to access a page of Help hints and tips.

The About/Contact us menu bar link has been moved onto the bottom of the Home page.

**Program:**

The summit’s Program guide will be updated reflecting teh final-final summit agenda and current speaker list.

**Notes:**

A series of captured notes and transcriptions from the summits proceedings will be made available in this section.

**Backchannel:**

A dedicated page displaying the ‘backchannel’ communication occurring during the summit. Each attendee will be provided tools so that he/she may participate in this backchannel.

**Webcast:**

A dedicated page where the summits live webcast – will be displayed.

**Phase III backend tools**

- **Backchannel admin** - a simple tool to control the content of the backchannel will be provided.

* **Notes** – provide the ability for sys admin to add content to the Notes page

**Phase IV website**



As soon as time permits after the summit is concluded - an updated, final version of the website will be turned live which will both serve as an archive and record of the proceedings and video documentation of the summit, as well as facilitate on-going conversations and discussions arising out of the summit.

This ‘post-summit’ website will be a permanent record of the summit and keep the “conversations” going - along with the help of human ‘conversation facilitators.’

**Home**

The Home page will be updated; thanking attendees for participating and laying out a planned agenda for the next year. Key messages, issues, conversations and discussions will be highlighted.

The Program, Tools, Notes and Backchannel menu items will be removed from the menu bar, but those pages will still be available via Home page links. The backchannel widget will be removed.

**Conversations**

An on-line, interactive ‘discussion’ board or ‘conversation’ tool will be made available on this page. Vendor will need to make their own suggestion as to which BBN board, Forum, tool they recommend to achieve this function. Ideally Quora would be available in “widget form.”

The conversations coming out of the summit will need to be coaxed and facilitated with ‘extra’ staff who will act as ‘conversation facilitators.’ On-going topics or tags should also be highlighted and built into the conversations interface.

**Phase IV backend tools**

**Back-end tools:**

- **Conversations management** - spam control

Some sort of conversation tool management software must be made available as a backend tool - for the final phase of this website.

**Responsibilities:**

- Client

- collaborate with vendor, review and approve all page layouts and site map

- provide design artwork - in .psd format

- define all info architecture and design

- create and provide all content: on-screen text, documents, links

- maintain membership list - and whitelist of attendees

- create questions, aggregate results

- create ‘During’ transcription - provide file versions of those transcriptions

- operate other website sys admin controls

- all webcasting will be handled by other vendors….

- Client’s interests, designs, agency, POC, and main liaison are via **Marc Canter**

- Vendor

- creation of the site - as per client’s instructions and specifications

- tweak, iterate, adjust website - as per client’s instructions and user feedback

- install all plugins, maintain version control and take responsibility for all technical matters

- take .psd artwork, turn into HTML and functional website

- hosting of site - low traffic - minimum media

- phase in the website over three distinct periods of time:

* + - * - Before to...
      * - During to...
      * - After