



# Society for Scholarly Publishing

## Request for Proposal for In-Kind Abstract Management Services

### PURPOSE

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The Society for Scholarly Publishing (SSP) desires the services of a technology provider on a cost-neutral basis to support the abstract management needs of the organization as described within the Scope of Work starting in September 2023.

SSP believes industry suppliers are essential to our organization and SSP would like for each of our members who provide these services to have an equal opportunity to offer their solutions for this purpose. In-kind donors have the opportunity to showcase their products and services to approximately 1,100 scholarly publishing professionals throughout world.

The goal of this RFP is to enter into an arrangement that provides a supplier with promotion of its brand to influencers and purchasers in exchange for abstract management services.

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## HISTORY OF ASSOCIATION

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The Society for Scholarly Publishing (SSP), founded in 1978, is a nonprofit organization formed to promote and advance communication among all sectors of the scholarly publication community through networking, information dissemination, and facilitation of new developments in the field. SSP is focused on individual professional development and does not have an advocacy function.

SSP members represent all aspects of scholarly publishing—including publishers, printers, e-product developers, technical service providers, librarians, and editors. Our goal is to have SSP be the community for everyone engaged in scholarly publishing, members and non-members, where they will find forward-thinking programs, important dialogues about the evolving scholarly system, and partners to share their expertise and progress.

SSP has roughly 1,100 members with membership continuing to trend upwards. Our dues structure is designed to be affordable, with lower-cost categories for early career professionals, students and librarians. Roughly one-half of our members come through organizational memberships. Member benefits include discounted registrations to events, access to a member directory, online access to *Learned Publishing* (an industry journal), discounts, and the ability to participate on SSP committees, in the SSP mentorship program, and in our online community.

SSP membership numbers have remained consistent over the past few years, members remain engaged with the organization. Attendance at the annual meeting and participation by sponsors and exhibitors is rebounding after the pandemic. The Society’s blog, *The Scholarly Kitchen*, has over 15,000 daily alert-subscribers and over 26,000 followers on Twitter. SSP’s website had nearly 40,000 visitors in 2022. The organization has over 9,000 Twitter followers and 8,000 members in its Linked-in group.

## MISSION, VISION, CORE VALUES, & STRATEGIC GOALS

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### Mission Statement

To advance scholarly publishing and communication, and the professional development of its members through education, collaboration, and networking.

### Vision Statement

SSP will be recognized by members and the global publishing community as the first place to turn for information and dialogue on current and emerging issues in scholarly communication.

### Core Values

**Community** Bringing diverse stakeholders together to harness their collective knowledge and unique perspectives; creating connections that result in authentic relationships.

**Inclusivity** Providing equitable opportunities for individuals from diverse backgrounds to feel welcome to contribute their thoughts and ideas to the scholarly publishing community.

**Adaptability** Challenging the status quo, embracing new ideas, and maintaining effectiveness in an evolving environment; learning from mistakes to improve all aspects of scholarly communications.

**Integrity** Building trust through responsible actions, transparency, respect, and honest relationships.

## Strategic Goals

### **Embed diversity, equity, inclusion, and accessibility in all that we do**

Actively ensure that we are intentional about incorporating DEIA in all our activities and programs, identifying and addressing areas of specific strategic importance that enable us to build a more diverse and inclusive community of members and participants

### **Make SSP a home for scholarly communications professionals at every career stage**

Provide opportunities for both leadership and career advancement for all career levels through continuing education, networking, and mentorship for scholarly communications professionals

### **Engage with the global scholarly communications community**

Seek opportunities for SSP and our members to engage with and learn from individuals and organizations with a broad range of expertise, experience, perspectives, and knowledge from around the world—working in and adjacent to our community

### **Develop new content and services**

Explore opportunities for content, programming, and other services to enhance the range and diversity of resources for our members and the wider community

### **Ensure SSP's continued financial sustainability**

Decrease reliance on revenue from the annual meeting by exploring opportunities for a more balanced distribution of revenue from other programs and services, to ensure that we can continue to support the work of SSP staff, committees, and the wider community

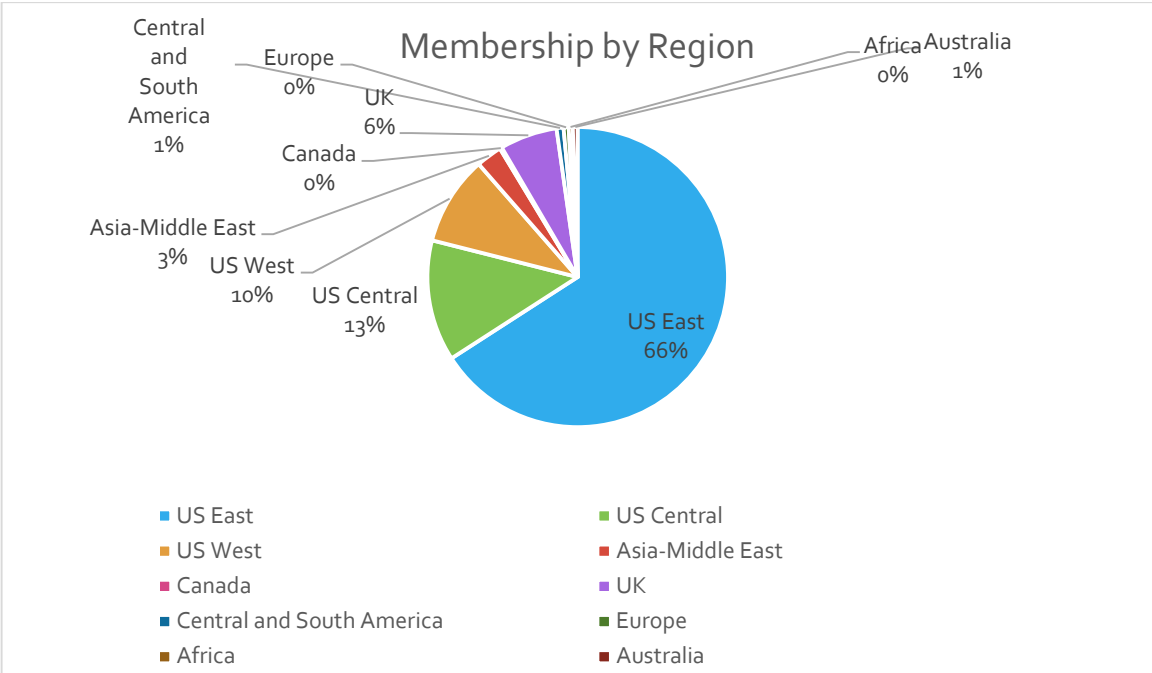
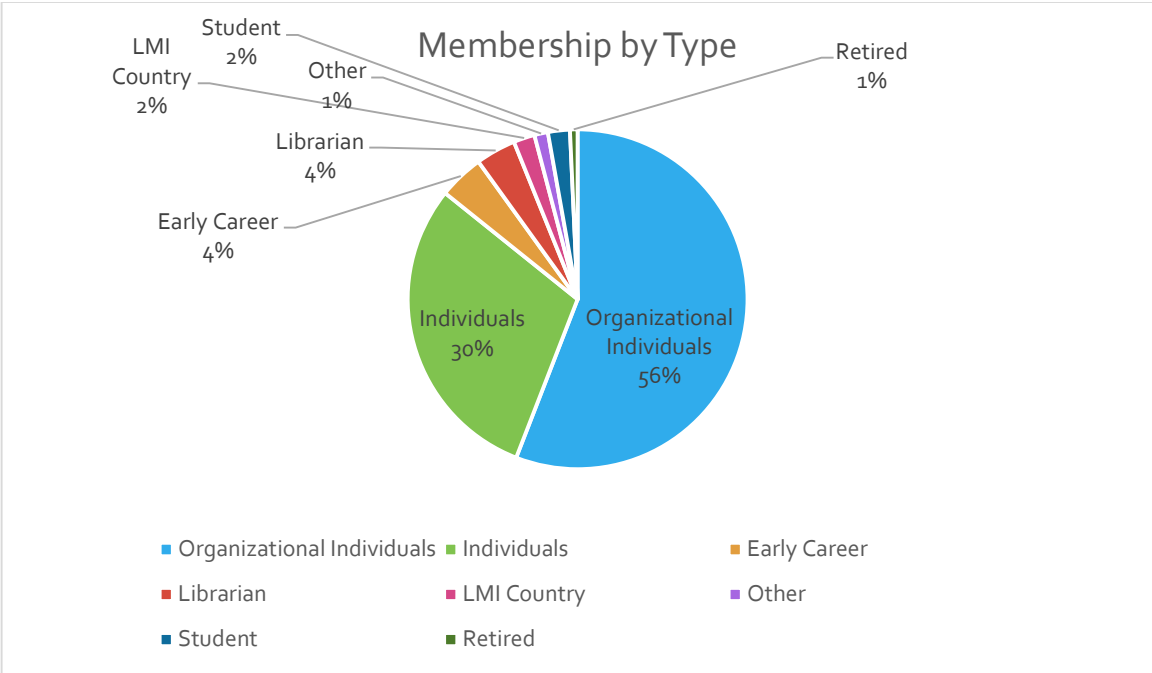
## ORGANIZATIONAL INFORMATION

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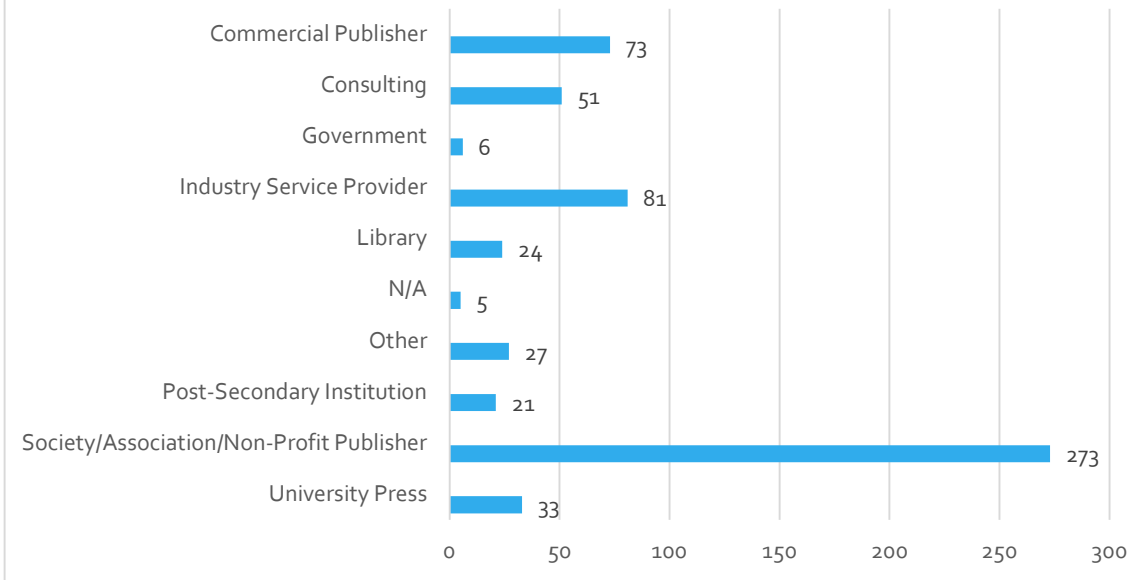
SSP is a non-profit corporation incorporated in the District of Columbia. The purpose is to promote and advance scholarly communications among all sectors of the scholarly publication community through networking, information dissemination, and facilitation of new developments in the field. The Society is organized for educational purposes and is operated as a non-profit corporation within IRS code 501(C)(3). SSP does not have chapters or components and is not a chapter or component of any other national or international organization.

# ABOUT OUR MEMBERSHIP

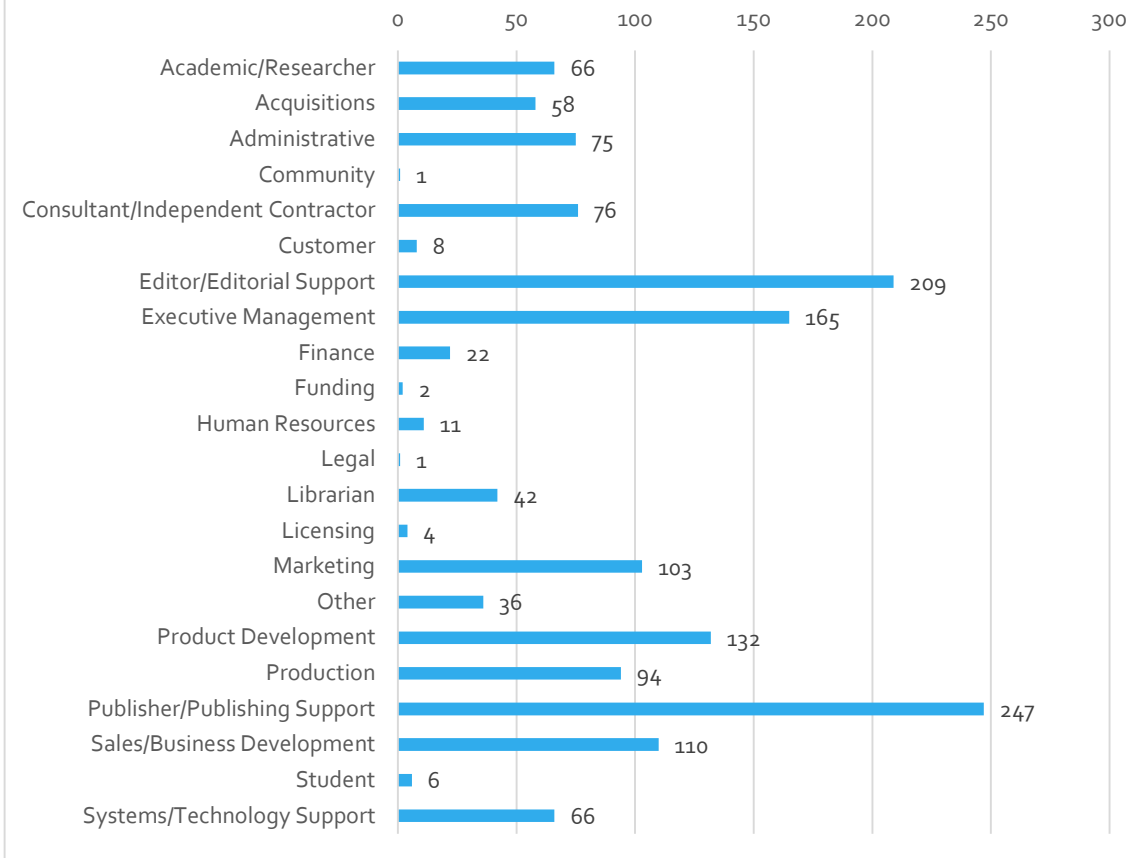
## Membership Statistics (May 2023)

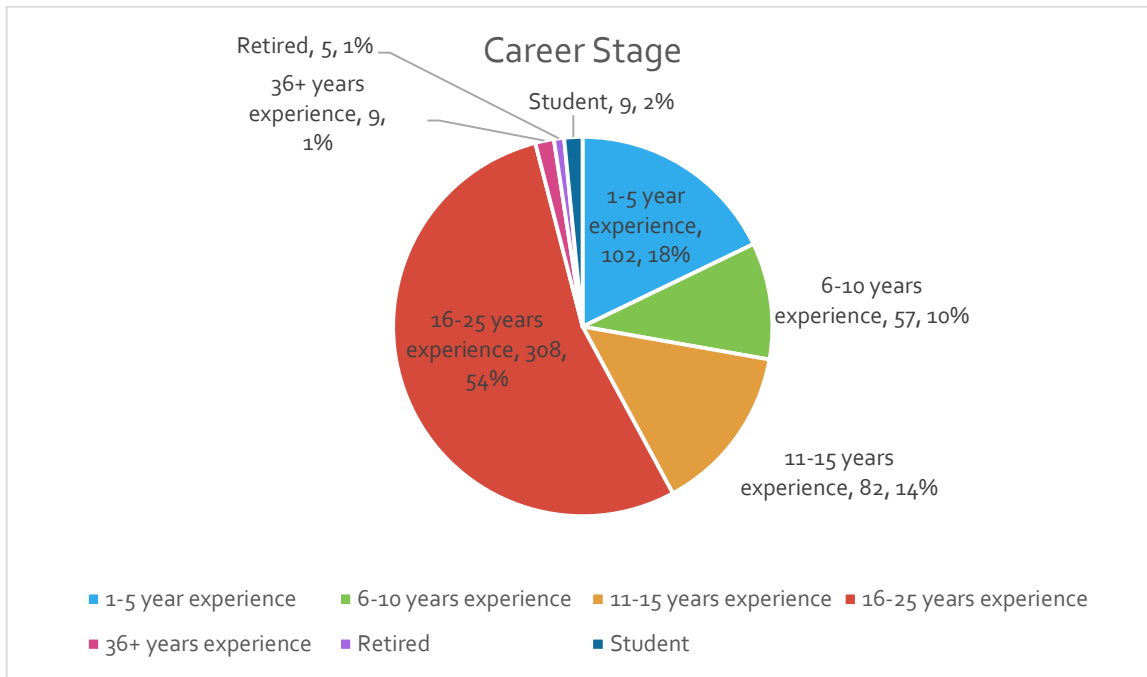


## Membership by Organization Type



## Area of Specialization





## SPONSORSHIP BENEFITS

In addition to visibility of your products/services by SSP members and other industry professionals, in-kind donors will be acknowledged and recognized during the term of the contract in the followings ways:

1. SSP press release announcing the service sponsorship (promoted via the SSP home page, *RE:member*, social media channels, and RSS feed)
2. Company logo and Service Sponsor attribution displayed on the SSP website home page footer (\$675 value/year)
3. Three-month rotating banner advertisement (300 pixels x 250 pixels) on the SSP Homepage annually. Frequency of banner ad rotation will be determined partly by demand per page during the requested display period; ad position below navigation; sponsor selects months for display; must be continuous (\$1,750/year)
4. Four free webinar registrations annually (\$220 value/year)
5. One complimentary registration to the SSP Annual Meeting (\$950 value/year)
6. Recognition as a service sponsor on the Call for Proposals web page and email communications requesting proposals

Values listed above are based on standard SSP member rates.

Should the in-kind donation not be 100% donation, but instead a percentage of the total value of the product/services provided, SSP reserves the right to negotiate the sponsorship benefits based on the offer provided.

Award of a contract for in-kind products and services does not constitute an endorsement by SSP for one supplier's product or services over any other suppliers' products or services. A statement as such may be included on the SSP website.

If there are specific benefits not listed here that would provide a greater incentive for your in-kind donation, please outline them in your proposal under additional bid considerations.

## SCOPE OF SERVICES

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### Technical Specifications

SSP requires an abstract management system for the submission, review, and final publication of its Annual Meeting session abstracts. This section outlines some of the roles, functionality, and general attributes sought in an automated vendor system, but it is not meant to be a comprehensive list. We invite bidders to offer suggested solutions that may include but are not necessarily limited to these requirements.

#### User Roles for the system include:

- Submitter: submits a session idea for consideration
- Co-chair: manages the submission process, assigns reviewers, tracks review process, makes the final acceptance decision and communicates decision to submitters
- Reviewer: reviews, ranks, and votes on assigned submissions
- Organizer: manages the process of finalizing the session details and assisting session participants after a submission has been formally accepted
- Shepherd: assists organizer
- SSP Staff: should have "super-user" designation; includes the Executive Director, Program Director, and Conference Manager.

#### Key tasks that should be supported include:

- Submitter: uploads session description; checks status of submission. Note: There is only one Submitter per submission, and the Submitter may also be the Organizer and/or Shepherd.
- Co-chair: assigns reviewers to a submission; determines submission scoring criteria; selects/rejects reviewed submission; prepares and sends email notification through system to submitters regarding acceptance or rejection; assigns organizer/shepherd(s) to a submission; designates when session record is final. Note: Co-chairs will share responsibility across all submissions.
- Reviewer: rates the submission on several criteria (using Likert scale). Note: There will be multiple Reviewers per submission, and each Reviewer will review multiple submissions, but not necessarily all submissions
- Organizer and Shepherd: edits/updates submission over time; corresponds with session participants
- SSP staff: downloads/publishes session information to the SSP database/website and into the Annual Meeting program (preliminary program as well as final program); acts as super-user of system

#### Session record information should include:

- Submitter: including name, affiliation, type of company, contact information
- Session title/subtitle
- Session keywords
- Session description
- Session goal
- Session theme
- Session track
- Session "learning level"
- Session format
- Session Organizer: including name, affiliation, contact information
- Session Shepherd: including name, affiliation, contact information
- Session Speaker(s): including name, affiliation, contact information, and bio
- Submission status
- Reviewers: including name, affiliation, contact information
- Reviewer recommendation
- Co-chair(s) final selection decision
- Notes
- Attachments
- Email correspondence

Note that system should allow for several different session types: educational session, industry breakout session, preview presentation, and poster session.

**Additional system and service attributes include:**

*Platform & administration*

- The platform must be hosted online, not locally served.
- The platform must operate under a Service Level Agreement, to include platform availability and performance, as well as data retention and backup. It must comply with international security standards and be anti-spam compliant.

*User interface & functionality*

- The user interface should be easy to use and intuitive to all user groups.
- Platform should meet Web Content Accessibility Guidelines (WCAG 2.1)
- It must be possible for users to access SSP documentation guidelines from within the system, either via link to relevant places on the SSP website or via files hosted on the site. SSP Staff must be able to edit these links/files themselves.
- The submission form should be editable by SSP staff, allowing for both mandatory and optional fields as well as fields with multiple-choice responses. During the submission process, it should be possible to save an incomplete submission and continue with the submission at a later point, without losing any data. In addition, it should be easy to navigate back to a previous screen without losing data.
- The system should be workflow-based and facilitate automatic task assignment and email reminders.
- Workflows should be simple, requiring a minimum number of screens and clicks to get through a process.
- Changes to forms and workflows should be auditable in a way that allows appropriate users to retrieve versions of forms and webforms as they were in use at the time of processing a particular submission.
- It should be possible to link related session submissions within the system.
- The system should facilitate regular reporting, including the generation of custom reports, and provision of website analytics reporting. SSP staff and co-chairs should be able to export contact information for session organizers and speakers.

*Tracking*

- The system should allow tracking of sessions from submission through decision to final publication.
- SSP Staff and Co-chairs must be able to track all sessions through all stages of the processes.
- Co-chairs, Reviewers, Organizers, and Shepherds should at any time be able to access a list of sessions currently assigned to them, as well as a list of previously assigned sessions.
- Co-chairs must be able to check every reviewer's history within the system.
- Reviewers must be able to view their own history within the system, and to check the full review history of a manuscript they have reviewed in the past, apart from other reviewers' names.
- Submitters should be able to track where their sessions are at every stage, and be able to access a list of submissions they currently have under review, as well as a list of previous submissions with their history
- Co-chairs must be able to suppress "acceptance" and "rejection" alerts until such point when they enable the release of such notifications.

*Correspondence & notes*

- The system should allow customized email correspondence, and all email correspondence should be stored in the system as part of the session's audit trail.
- It should be possible to include attachments in any email correspondence sent through the system, and the adding of attachments should be managed in a simple, intuitive fashion. It should also be possible to include embedded links in any correspondence sent through the system, and to include formatted text and images in correspondence sent through the system.
- The system should make it possible to include all persons associated with a session (including all speakers) in any correspondence.



### *Publishing/Production*

- The system should allow the final set of Annual Meeting sessions for a given year to be downloaded/exported for use as a conference program on the SSP website, as a printed preliminary program and as a final printed program.
- The system should allow for sessions / submissions to be exportable (such as into Excel, for example) along with selected data fields to facilitate offline analysis / manipulation.

### *Support & training*

- The vendor must provide training as part of the implementation plan and direct support for two months after. In addition, the vendor must provide periodic, ongoing training and support – whether in-person, virtually, via online tutorials, or some combination – through the full term of agreement.
- Online help and guidance should be available to all users at all stages (e.g. in the form of Help links).
- The vendor should provide account/project management, where the vendor relationship manager acts as a mediator between SSP and the vendor's development team, as needed. Ideally, the vendor relationship manager should manage any task tracking software on behalf of SSP.

### *Integration with other systems*

- Vendor should include information on whether and to what degree the product integrates with other systems, particularly association management systems (iMIS) and conference/meeting mobile Apps (eg. Whova).

### *Additional Specifications*

#### **Other optional attributes that are not required, but will be considered when awarding the final contract, include:**

- Ideally, the system will allow shepherds and organizers to edit abstracts and other session information after acceptance, to facilitate program production.
- The system will allow changes to submitter contact information when necessary (e.g. in the event of job change) and tie those changes to the original session submission.
- The system will offer speaker management options for speakers of accepted sessions—including photo submissions, media and code of conduct releases, etc.

### *Length of Contract*

The resulting contract with the awarded bidder shall have an initial term of three years.

### *Additional Bid Considerations*

Bids may include unique benefits and/or amenities that demonstrate additional support for SSP in order to differentiate bid from other proposers and to strengthen the overall proposal. Possible considerations may include value added services that enhance the user experience or support for other SSP programs.

## **PROPOSAL COMPONENTS**

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Proposals should be delivered as a via email to the contact listed below. Please limit your proposal to no more than 20 pages. Proposals should include the following:

1. Your organization's SSP membership status and sponsorship history
2. A description of how your product/service addresses the requirements described in the Scope of Work
3. A description of how your product is accessible to people with disabilities—including visual, hearing, motor, and cognitive disabilities
4. Additional bid considerations
5. Primary supplier contact
6. A brief project plan outlining the stages and milestones for an abstract management system
7. Examples of your abstract management system
8. Any annual or one-time costs that are not covered as part of an in-kind donation.

9. The total value of any in-kind donation.
10. Primary suppliers contact
11. Client references

## EVALUATION CRITERIA

| CRITERIA                                                                                                                                                                                                                                                                                                                                                                                                            | SCALE                                        | MAXIMUM POINTS |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------|----------------|
| <b>1</b> System Functionality<br><br>Points are awarded based on factors such as usability, ability to meet SoW requirements; user support offered, functionality, etc.                                                                                                                                                                                                                                             | 0-60 points                                  | 60 points      |
| <b>2</b> SSP Membership Status<br><br>Non-member<br>Individual membership(s) of supplier staff<br>Supporting Organizational Member<br>Sustaining Organizational Member                                                                                                                                                                                                                                              | 0 points<br>2 points<br>3 points<br>5 points | 5 points       |
| <b>3</b> SSP Sponsorship History (cumulative)<br><br>Sponsorship history will be ranked on cumulative points accrued from sponsorship of SSP events. The top ranked proposal will receive the maximum points and the second, third, fourth (etc.) ranked proposals will each receive 2 points less than proposal ranked immediately higher. If there is no sponsorship history, the proposal will receive 0 points. | 0-10 points                                  | 10 points      |
| <b>4</b> Additional Bid Considerations (ranked)<br><br>Additional bid considerations will be ranked based on value to SSP and its membership. The top ranked proposal will receive the maximum points and the second, third, fourth (etc.) ranked proposals will each receive 2 points less than proposal ranked immediately higher.                                                                                | 0-10 points                                  | 10 points      |
| <b>5</b> Cost Considerations<br><br>Points will be awarded based on approximate % value of in-kind donation. Proposals with a 100% in-kind donation will receive 15 points, 99-75% in-kind donation = 10 points; 50-74% in-kind donation = 5 points, > 50% = 0 points.                                                                                                                                              | 0-15 points                                  | 15 points      |

Each proposal will be scored by a review committee using the criteria above. Maximum total points is 100. The bidder with the highest point value will be awarded the contract. In the case of all other scores being equal, preference will be given to 100% in-kind donations.

## AWARD

This Request for Proposal does not commit SSP to award a contract. SSP reserves the right to reject all proposals, and at its discretion, may withdraw or amend this Request for Proposal at any time. If SSP issues an award, the award will be made to the bidder whose offer best meets the evaluation criteria. However, if SSP does not consider the offer to be fair

and reasonable and negotiations fail to meet acceptable terms, then SSP reserves the right to cancel the award and take appropriate action to meet the needs of SSP. SSP will determine whether the offer is fair and reasonable using the evaluation criteria listed above. SSP will notify all bidders regarding the award.

## TIMELINE

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The following timeline will apply to this process. All proposals and questions should be submitted via email. If the timeline changes, the review committee will keep you apprised.

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|--------------------|---------------------------------------------------|
| <b>JUNE 30</b>     | RFP distributed to potential service providers    |
| <b>JULY 12</b>     | Q&A period closes                                 |
| <b>JULY 22</b>     | Final receipt of all proposals for consideration. |
| <b>JULY 29</b>     | Invitation for demonstrations (if applicable)     |
| <b>AUGUST 1-5</b>  | Demonstrations                                    |
| <b>AUGUST 8-12</b> | Evaluation of proposals by review committee       |
| <b>AUGUST 19</b>   | Notification of award                             |
| <b>AUGUST 31</b>   | Contract executed                                 |
| <b>SEPTEMBER</b>   | Setup of system for 2024 Annual Meeting           |
| <b>OCTOBER</b>     | Call for Proposals opens for 2024 Annual Meeting  |

## CONFLICT OF INTEREST

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Review committee members will certify that they do not have any personal connection with any bidder(s). If a committee member has a personal connection, this connection shall be disclosed and the committee member will recuse themselves from the evaluation process.

## CONTACT INFORMATION

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For questions regarding this RFP, please contact:

Susan Patton, Program Director  
spatton@sspnet.org

Please submit questions via email.