



Request for Information (RFI) for Design and Development of a Website and Digital Systems

Ontario Museum Association (OMA)

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Closing Deadline: May 5, 2022, 5pm ET

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1 Introduction

1.1 Purpose (Mission and Goals)

The Ontario Museum Association (the OMA) has outgrown the functionality of its current professional and public websites, members.museumsontario.ca and www.museumsontario.ca. This Request for Information (RFI) has been initiated by the OMA for the purposes of gathering information for the design and development of a website and digital systems.

As part of an overall digital transformation for the Association, the OMA has identified a digital strategy for a new, federated model of digital services and website intended to create a seamless member experience, to build OMA capacity, and to integrate several services to facilitate data flow between different component parts of the system in a more flexible and effective way. We understand “federated” to mean potentially different components linked together, with the ability to use a single authentication (login) to provide access to all systems. The federated model will bring together components including a customer relationship management (CRM)/Association Member Management System, Content Management System (CMS), Learning Management System (LMS) to update association and member database, events & registration, transaction capabilities (ecommerce), resources section, and connection to OMA communications platforms.

The OMA would like to increase member value with an updated, interactive website and Content Management System with ecommerce (financial transactions/PayPal payments) capabilities focused on member experience. This platform should reflect the OMA’s mission to strengthen capacity among institutions and individuals active in Ontario’s museum sector, enhance and evolve member experience in many ways including visually, behaviorally and with accessibility compliance, and achieve the goal to increase earned and fundraised revenue. The new digital services and website should allow the staff to perform actions in the simplest way possible in order to improve communication and collaboration with OMA members efficiently.

In advance of the end-of-life of Drupal 7, this project will use a phased approach to implementation, prioritize the systems that will be affected by the Drupal 7 end-of-life, and manage the transition to the new federated model so that functionality is available when required, including for course and conference registration.

This RFI is an open invitation to experienced providers. The requirements stated in this RFI are as envisioned by the OMA at the time of writing; these may change or be redefined during the evaluation and negotiation process.

The RFI is also intended to assist the OMA in acquiring relevant service information for budgeting and planning purposes without further commitment on its part. Any pricing information submitted by respondents shall be for general information purposes only, and will not be binding on the provider. Therefore, this RFI does not constitute a solicitation for

Bids or Proposals and no Respondent will be awarded a contract by the OMA as a result of information provided in response to this Request. The purpose of this RFI is to solicit information only from respondents, and this RFI is not intended to be a formal, legally binding bidding process.

The OMA intends to retain the information received for further reference. If the OMA subsequently decides to proceed with this project, in whole or in part, the OMA may include such Respondent(s) in any subsequent invitation it issues to submit formal Proposals, such invitation being subject to budgetary availability and project approval, and being at the sole discretion of the OMA. The OMA reserves the right to seek subsequent information from or initiate negotiations with any providers, including those who did not respond to the RFI.

1.2 History

OMA History

Founded in 1972, the Ontario Museum Association is a non-profit professional association for the more than 700 museums, galleries and heritage sites; 11,000 museum professionals, and 37,000 museum volunteers across the province of Ontario.

The OMA leads the sector as an Advocate, Thought Leader, Professional Body, and Convenor.

Since 2013, the Ontario Museum Association has been actively involved in a future visioning project for Ontario's museum sector. Led by a Task Force of museum leaders, supported by the OMA, the work resulted in a forward-thinking vision for the sector known as *Ontario's Museums 2025: Strategic Vision and Action Plan*. This work was informed by broad consultation with and participation of Ontario's museum sector. The consultations surfaced current issues and trends faced by museums and identified the central role of the Ontario Museum Association in advocating for and supporting the sector. Ontario's *Museums 2025* was carefully considered by OMA's Council in developing the OMA's own *Strategic Plan for 2016-2021*. The resulting strategic plan *Towards 2025: the Ontario Museum Association's Strategic Plan* establishes priorities for the OMA to address from Ontario's *Museums 2025's* 4 themes, 16 outcomes and 10 actions.

During the pandemic, the OMA shifted to online-only delivery of professional development and the OMA Annual conference. In 2021, the OMA developed a Digital Strategy, aiming to eliminate technical debt of aging systems and to ensure that ongoing projects have stable platforms for member data and project deliverables to remain.

OMA Website and Digital Systems History

The Ontario Museum Association's current website, both Content Management System (CMS) and Member Management System (MMS) were built in Drupal 7 a decade ago. These systems connect directly to the Learning Management System (LMS) and the transaction service PayPal.

As Drupal 7 nears end-of-life, the OMA aims to replace the current Content Management and Member Management systems and deploy a new user experience for the website.

The most recent work on the OMA's digital infrastructure was an update to the Learning Management System in Moodle and a reorganization of the Resources section to facilitate member-only access to certain resources hosted on the OMA website. These actions were taken following feedback and focus grouping from OMA members about the ways in which they use the OMA website.

The OMA's current professional website (members.museumsontario.ca) serves as the nexus of all OMA programs (membership, professional development, advocacy, communications), handling paid event registrations, listing the OMA's events, hosting OMA resources and a Job Board for Ontario museums, and supporting a Services Directory which lists and promotes Commercial members who provide services to the Ontario museum sector. The professional website is centered around the Member Management System which sends automated reminder emails and receipts as part of the membership renewal process.

Within the OMA's digital infrastructure are additional web presences connected in different ways to the OMA's professional website and Member Management System. Most directly connected is the OMA's public website (www.museumsontario.ca) that serves as a tourism-focused directory of Ontario museums. Powered by the current Member and Content Management Systems, the OMA's public website offers a variety of ways to search, sort, and promote Ontario museums, such as special offers and event listings. Search functions and categories are currently very limited.

The OMA is also responsible for a bilingual virtual exhibit microsite, mon400.com, that celebrates 400 years of Francophone presence in Ontario.

In recent years, the OMA has also licensed a Conference platform with a connected app in order to streamline access to our online conferences and symposia.

The OMA currently uses MailChimp for newsletter communications and Hootsuite to connect to our social media profiles.

1.3 General Background

1.3.1 Vision and Strategy

Vision: The Ontario Museum Association is the leading professional organization advancing a strong, collaborative and inclusive museum sector that is vital to community life and the well-being of Ontarians.

In 2021, OMA developed a new strategy to lead the organization forward through the process of digitalization. Digitalization, the transformation of OMA's operations and services through digital means, is underpinned by digitization - the transfer of analogue methodologies and formats to digital media and platforms.

The digital strategy is founded on three pillars:

- **Systems:** The digital tools, services and infrastructure that OMA uses.
 - Goal: Reduce technical debt and move towards a federated approach to digital infrastructure
- **Data:** Structured information arising from the sector and OMA's own work.
 - Goal: Ensure required data is being collected and move to data-driven decision making
- **Workflow:** The way that OMA organizes itself and its activities in order to deliver its program.
 - Goal: Formalize processes and adopt iterative methodologies

1.3.2 Key OMA Programs

Advocacy: Creating positive change for museums by proactively positioning and representing museums with stakeholders, funders, and governments at all levels. Providing resources and tools to empower museums as advocates.

Conference: The nexus of a strong network, building a more collaborative, professional and connected sector through the OMA's Annual Conference.

Professional Development: Providing professional development programs fostering continued professionalization of the field through the nine-course Certificate in Museum Studies program and its 400+ graduates, as well as webinars and workshops, including the OMA Annual Conference.

Thought Leadership: Advancing the museum sector through research and the promotion of internationally-recognized best practices.

Membership: Providing member services to 300+ institutional and 1000+ individual OMA members.

Communications: The OMA uses digital communications to create connected networks within the Ontario museum sector, including a weekly e-Newsletter, timely eNews Alerts, and social media profiles.

1.3.3 OMA Staff, Governance, and Stakeholders

- i. OMA Staff team of four, supplemented with interns and contract staff
- ii. Project Coordinator: will oversee the project and use their organizational and communications skills to support the OMA's digital transformation
- iii. Professional Development Program Manager
- iv. Strategic Initiatives Coordinator
- v. OMA Council (Board) of 12 museum professionals elected from across Ontario
- vi. Ontario's Regional Museum Networks (RMNs), 20 Museum Networks in regions across the province
- vii. Other arts and culture organizations and associations in Ontario

1.3.4 OMA Audience

300+ institutional and 1000+ individual OMA members, museum workers (11,000 paid and 37,000 volunteer in Ontario), museum board members, students enrolled in Museum Studies programs and emerging museum professionals.

Membership categories are:

- 1) Individual Members
 - a) Museum/Cultural Worker
 - b) Colleague
 - c) Supporting Members
 - d) Student
- 2) Institutional Members
- 3) Commercial Members
 - a) Corporate Members
 - b) Consultant Members

1.4 Main Objectives of the Project

The scope of this project is to create a federated model of digital systems and website with the intention of optimizing member (user) experience and making OMA administrative processes more efficient. The OMA encourages creativity in the development of the project; however, there are certain requirements. We respectfully request that the information provided include recommended strategies for:

- Developing a new Content Management System that will enable the OMA to easily and effectively update content on its Website
- Improving the member experience and satisfaction – ease of use, speed, and content.
- Implementing an Association (Member) Management System (AMS)

- Integrating the Association Management System (AMS) with the Learning Management System (LMS)
- Integrating with the Resource Hub, a resource database
- Gaining a better understanding of our members and the sector through functions for data collection and analysis, such as reports.
- Streamlining member registrations, transactions, invoicing and receipting as a part of customer relationship management
- Considers brand reputation and awareness – demand generation
- Migrating existing content and maintaining data fidelity
- Enhance career support services through an improved Job Board and data collection and reporting on compensation
- Enhance tourism benefits of public-focused website, such as event listings for Ontario museums with links to registration-- generating revenue for individual museums
- Increase opportunities for promoting Commercial members and their services
- Considering the digital transformation of the OMA to further the four strategic directions of *Ontario's Museums 2025*, including a province-wide approach to museum collections
- Alignment with the OMA's mission, vision, and values

Your submission can consider a critical path and timeline for the completion of project, with phased implementation and related costs, and identify how vendors, stakeholders, and the client can work together.

Ultimately, the OMA will need to maintain ownership of the website both in part and whole, its components, content, domains, templates, and plugins. The OMA plans to operationalize the website with internal staff.

2 Project Outcomes

2.1 Deliverables

The information submitted to this RFI should consider the following critical outcomes:

2.1.1 Review

- i. A review of the OMA's current systems prior to commencement of the project for discussion and to inform recommendations of components, structures, platforms, and data migration for the federated model.

2.1.2 Design

- i. A strategic approach and design concept in presentation format, prior to the commencement of the build, to meet project goals and address challenges, requirements, and objectives. A critical path and timeline for the completion of project, with phased implementation and related costs.
- ii. A responsive design that is flexible and renders properly for different screen resolutions on all browsers and devices. Should be accessible on low bandwidth.
- iii. Cohesive design incorporating and supporting current OMA branding. Custom site-wide graphics and visuals that help brand the site and achieve the desired look and feel of a new effective and engaging website using the OMA's existing brand elements, logo, and colour scheme with input from provider on brand development for digital applications.
- iv. The creation of a style guide that details standards for use of fonts, colors, templates, graphics and photos.

2.1.3 Content Management

- i. A Content Management System (CMS) that allows in-house staff to easily and cost-effectively update content and modify website design after initial launch with suggestions for management of additional systems and platforms
- ii. Sufficient training and documentation to ensure future independent updates should be provided. Training shall include administrator and security level, as well as a member (user) level. Training will be provided at a minimum in an interactive recorded webinar format. On-site training would be ideal.

2.1.4 Function

- i. The website must be Compliant with AODA standards for Accessibility, with costing options providing for alternative accessibility levels if needed.
- ii. The website must be mobile-friendly and easy to navigate. The website design must load quickly, provide uniform interfaces, engaging content, seamless ordering experience, and multi-level registration.
- iii. The federated model of digital services and website should increase communication and connection with existing and potential members. This includes e-mail marketing and communications, virtual experiences, webinars, streaming videos, ecommerce and membership process automation, and event calendar.
- iv. A solution to grant access to different levels of the site to different demographics such as members, staff, etc.
- v. The website should be able to accommodate the French version

2.1.5 Billing and Payments (Ecommerce)

- vi. Must support transactions through recognized online payment system (such as PayPal)
- i. Search engine optimization, ecommerce integration, well-organized content, mega menu pro capability so that different levels of user/administrator access different options, effective calls to action, increased conversion rate and therefore, profitability, and earned and fundraised revenues are critical.
- ii. The website must drive traffic, engage prospects, generate leads, and convert leads.
- iii. A fully customizable ecommerce platform for membership sales, donations, fundraising programs, events, as well as the implementation, sale, and delivery of online virtual programs, courses, and workshops.

2.1.6 Backend

- i. The provider should help reduce the OMA's costs by streamlining and automating workflows and tasks, in alignment with the size of the OMA staff team
- ii. The website must integrate with other systems (Association Management System and Learning Management System "Moodle") and meet security,

scalability, and performance requirements (e.g. REST API).

- iii. The website must have a data layer (Google Analytics or equivalent) to track website visitation and behavior. We need a tool to help us better understand and measure website visitors' behavior and improve website performance and availability.

2.1.7 Advising

- i. Developer must recommend approaches and best practices plus hosting, support

3 Instructions

3.1 Responsiveness

For your submitted information to be considered responsive, you must comply with all the requirements of this Request for Information (RFI).

3.2 Information Delivery

The information provided shall address the deliverables requested. Information should be complete and demonstrate that the provider can perform professional work. You are welcome to provide any other information deemed appropriate for this project.

Please forward one electronic copy of your response to the attention of Marie Lalonde, Executive Director at the Ontario Museum Association.

community@museumsontario.ca

Ontario Museum Association
50 Baldwin St, Toronto, ON M5T 1L4

The submitted information will only be accepted by the OMA if they are received at the specified email address as indicated above, on or before the Closing Deadline of May 6, 2022, 5pm ET.

All responses received under this process shall become the property of the OMA.

3.3 Submission Form and Content

- Please describe how you think you, as a provider, are in line with the mission and values of the OMA.
- Describe your experience and history, clearly conveying your strengths and demonstrating the following qualifications:
 - (a) A minimum of five (5) years of verifiable experience designing, developing, and implementing enterprise-level website applications.
 - (b) Experience in SEO standards.
- Please include a brief summary of your organization including:
 - (a) A description of your firm's organizational capacity to produce the proposed project (e.g., staff, equipment, software, physical space, office location, etc.).

- (b) A company profile, length of time in business, and core competencies.
 - (c) Bios of each firm member to work on the project with a complete outline of their role in the project and **relevant** past experience.
 - (d) Your firm's project management process.
 - (e) An outline of any hardware/software vendor partnerships used.
 - (f) Your testing and support plan.
 - (g) Your service-level agreement structure.
 - (h) Disclosure of any relevant conflicts of interest and/or pending lawsuits.
- Provide at least three (3) comparable relevant websites designed by your firm that exhibit complexity: blend of information and online services, and a wide range of intended audiences. Include the website address, company/agency contact, email address, telephone number. These companies/agencies may be contacted for references. Briefly list the role your firm played in each project. Clearly specify which services are provided in-house and which are outsourced. References in a similar field (arts and culture) are preferred.
 - Please attach your standard terms and conditions with the submitted information. The OMA reserves the right to make changes or additions to the presented document to fit the scope of this RFI.
 - An appendix with full resumes is allowed.
 - The submission should contain an approximate total cost of the project, as well as a detailed breakdown of costs for the project, including annual support and maintenance of the website. The Ontario Museum Association is a non-profit organization. We rely on in-kind support from partners, suppliers, vendors and other stakeholders to help us deliver free or low-cost services to our members. Commitment to community and to the goals and objectives of the non-profit sector are important to the OMA and to the success of this project.

3.4 Validity of Information

By submitting information, you warrant that it is valid for at least a period of 4 months after the Closing Date of this RFI.

3.5 Treatment of Information

The Ontario Museum Association reserves the unfettered right, in its sole and absolute discretion:

- (a) to submit questions to, or conduct interviews, upon reasonable notice, to seek clarification or to verify any or all information provided by you with respect to this RFI;
- (a) to seek clarification on some, but not all submissions;
- (b) to carry out reference checks with your current and/or previous clients;
- (c) to reject any or all responses received in response to this RFI if it/they fail to meet the objectives of the RFI;
- (d) to accept any submission to the RFI in whole or in part without prior negotiation and/or to waive any non-compliance by you in order to obtain the best overall value for OMA;
- (e) to terminate and/or re-issue this RFI at any time;

3.6 Confidentiality

- (a) The Ontario Museum Association recognizes the proprietary nature of information that may be contained in response to this Request for Information. The OMA will not use or disclose any confidential or proprietary information gained from this process, except as may be required by law, including but not limited to the Freedom of Information Act and Protection of Privacy Act, as well as Access to Information Act and the Privacy Act.
- (a) The OMA will not release any proprietary data or information without the express written permission of the effected party.
- (b) Providers must not refer, expressly or by implication, to the OMA, or to this competition, in any advertising or other publicity release unless otherwise stipulated in writing by the Contract Authority.
- (c) Providers shall keep confidential all information received from the OMA and other information developed for the OMA in connection with this competition. You shall not use such confidential information except as required to develop a response to this request.

3.7 Language

The working language for any and all work submitted shall be English.

3.8 Resulting Agreement Terms and Conditions

In the event of a conflict between the terms and conditions of the RFI and information submitted by you, the terms and conditions of this RFI shall govern. If an agreement is subsequently negotiated and one of the respondents selected, it is anticipated that the terms of such agreement will be consistent with the OMA's general form of contractual agreement and standard terms and conditions.

3.9 General Conditions

3.9.1 *Conflict of Interest*

Provider must identify any potential conflicts of interest that may arise given your firm's past and current work with certain organizations or individuals. Should a conflict of interest arise, the provider will advise the OMA how they propose to resolve the issue.

3.9.2 *Accuracy of Information*

By submitting you understand that this Request for Information is supplied solely as a guideline and that the information provided is not guaranteed or warranted to be accurate by the OMA, nor is it necessarily comprehensive or exhaustive.

4 Review

Your information will be reviewed by an OMA project team including staff and volunteers.

Questions should be directed by email to the attention of Marie Lalonde, Executive Director at community@museumsontario.ca.

The submitted information will only be accepted by the OMA if they are received at the specified email address as indicated above, on or before the Closing Deadline of May 6, 2022, 5pm ET.

Thank you for your submission.