

ROYAL CONSERVATORY OF MUSIC

DIGITAL MEDIA PROJECT

REQUEST FOR PROPOSAL

APRIL 26, 2010

Table of Contents

1. OBJECTIVES & DESCRIPTION OF THE REQUEST FOR PROPOSAL	4
2. ROYAL CONSERVATORY BACKGROUND	5
3. DIGITAL MEDIA PROJECT OBJECTIVES	8
4. PROJECT REQUIREMENTS	10
A. CONTENT MANAGEMENT SYSTEM.....	10
B. eCommerce	17
C. Social Networking.....	23
D. Membership Management.....	27
5. PROJECT OVERVIEW AND RESPONSE.....	29
Response Format:.....	29
Project Costs/Pricing:.....	30
Initial Investment	31
Ongoing Costs.....	31
Technical Considerations:	32
6. RFP PROCEDURE (DATES) AND LEGAL NOTICE	32
Vendor Experience:	34
APPENDIX B. VENDOR TECHNICAL QUESTIONS	35
Technology & Programming:	35
Hosting Capabilities:	35
System Maintenance and Support:.....	36
APPENDIX C. RCM CURRENT IT CAPABILITIES	37
Server Configuration:	37
RCM websites:	37
RCM Examinations:.....	37

RCM Community School and GGS/YAPA:.....	38
RCM Development and Performance Departments:	38
Financial/Accounting Systems:	38

1. OBJECTIVES & DESCRIPTION OF THE RFP

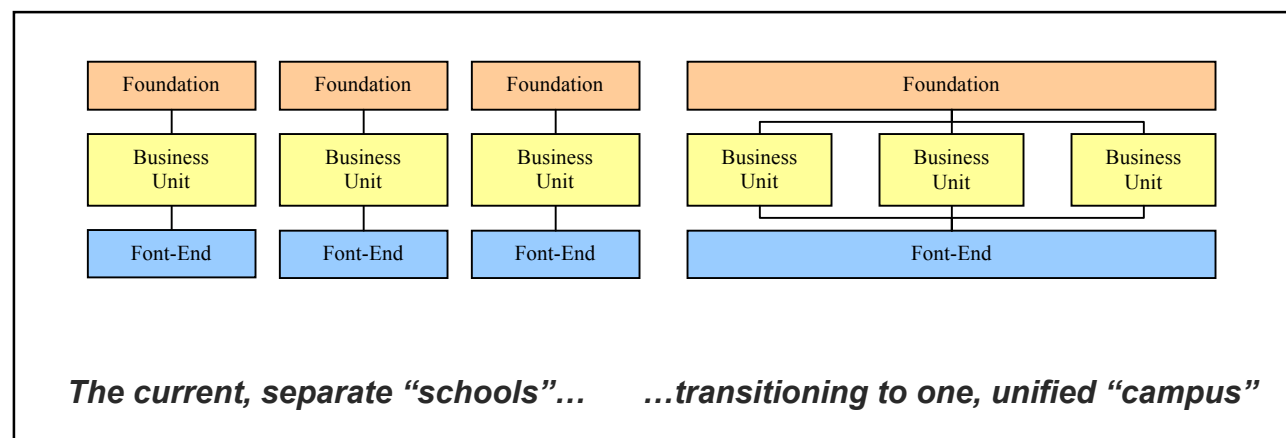
Through this Request for Proposal (RFP), the Royal Conservatory of Music (RCM) is seeking a vendor to plan, design, implement, and maintain technologies that will enable and support the RCM's digital vision and program.

RCM's digital vision (called myDigitalRCM) is to serve as a community hub for knowledge, learning and collaboration in music and arts education and performance.

The objectives of the myDigitalRCM program are to:

- Engage our customers and the music and arts community in the RCM experience
- Enhance our brand relevance
- Generate revenue from current and new services
- Expand our geographic reach in Canada and beyond
- Create an integrated RCM experience

In order to facilitate a unified digital presence, RCM is embarking on this digital infrastructure project to move from "separate buildings" to a "unified university campus" model. In the current state, a single RCM website (rcmusic.ca) provides links to the various RCM business units. Each of the business units has its own underlying web (including CMS) and backend technologies. This segregated model makes it difficult for the RCM to provide a unified customer experience.



What this would mean for any proposed solution:

- Separate buildings or infrastructure pieces would be unified to share a common look and feel and navigation so users will always know they are in a university building and be able to find their way around
 - *A common look and feel is paramount and the new infrastructure must link all RCM business units together*

- Infrastructure would be shared on “campus” (e-commerce, content distribution, etc) to ensure everything is linked together in one network and that all the digital platforms can be serviced through one system
- Information is also shared across the “campus”, so a customer can enter any building, but can only access buildings (and rooms within the building) appropriate to their ID (personalized experiences)
 - *Information must be shared across the system, with tools to facilitate member management*

This project will involve the following areas of responsibility:

- Establishing a new, unified front-end web presence for RCM
- In partnership with the RCM, developing a new information architecture and layout
- Programming the site
- Providing a back-end content management system
- Integrating additional functionality into the new system architecture
- Transferring and consolidating of existing data as required
- Providing on-going support and maintenance

2. ROYAL CONSERVATORY BACKGROUND

Founded in 1886, The Royal Conservatory of Music is a not-for-profit organization whose programs provide music and arts education and performance. RCM’s mission is to “Develop human potential through music and arts education programs – a leader globally in enhancing people’s lives through the creation of high quality, innovative programs that use music and the arts in learning and development.”

MARKET POSITION:

RCM is a leader in the music education market and has over 80% market share in music examinations in Canada. Other examples of similar organisations which offer examinations internationally include the Associated Board of the Royal Schools of Music (ABRSM), Trinity College of Music (London) and Conservatory Canada.

CURRENT OPERATIONS (BUSINESS UNITS):

Business Unit	Description
RCM Examinations (RCME)	Based in Mississauga, the largest division of The Royal Conservatory of Music sets and supports standards in music examinations across Canada and internationally through the RCM Examinations Certificate Program. Examinations are conducted three times each year in more than 300 communities through a network of local centres and a college of over 400 examiners. The Certificate Program encompasses all levels and spans 11 grades from beginner to certification as an Associate of The Royal Conservatory of Music (ARCT). There are currently 19 syllabi in 27 music disciplines. Achievement in RCM Examinations is recognized for credit toward secondary school graduation in many school systems in Canada. RCME has approximately 60,000-80,000 candidates taking about 100,000 exams per year and interacts with a community of approximately 13,000 music teachers. Classical piano comprises the majority of practical examinations. The customers of this division are both the student and the teachers that are promoting the RCM examinations to their students and their parents in most cases. Music teachers are also the major customer of the RCM Syllabi which outline the curriculum for each grade level.
RCM Community School	The Royal Conservatory's oldest and second largest division offers classes and private lessons in classical, popular, folk, jazz, world music and the arts to people of all ages and levels. It is one of the largest and most extensive community-based music and arts schools in North America and has more than 6,000 students of all ages, from infants to seniors. Classes are held in both Toronto and Mississauga.
Learning Through The Arts (LTTA)	Learning Through The Arts (LTTA) is an educational initiative to help public school teachers motivate their students using the arts. It provides creative tools to engage all students in math, science, language, arts and social studies. It currently reaches 100,000 children each year and is used in 400 schools across Canada and has its own website to support teachers delivering the program.

Glen Gould School (GGS)/ Young Artists Performance Academy (YAPA)	The Glen Gould School is a centre for professional training in classical music performance at post-secondary and post-bachelor levels. Enrolment is limited to 130 and it is supported by funding from the Department of Canadian Heritage through the National Arts Contribution Program. The Young Artists Performance Academy provides performance training to gifted young classical musicians aged between 7 and 17. After a competitive audition and interview, accepted students are streamed into Junior, Intermediate or Senior Academy programs. Most Academy activities take place on weekends, but students are expected to practice daily. Through the support of private individuals and foundations, financial assistance is available for all students.
Fredrick Harris Music Co.	Fredrick Harris Music Co. is the oldest and largest print-music publisher in Canada based in Mississauga, Ontario. The website and e-commerce sale of printed music is currently run on RCM systems.
Performances	Through its performance division, The Royal Conservatory aims to showcase the work of its own students as well as the very best jazz, world, pop and classical music acts from Canada and around the world in its own concert venues: Koerner Hall (1,135 seats, opening Sept. 2009), Mazzoleni Hall (237 seats), and Conservatory Theatre (150 seats). The customers of the Performances group are diverse, as they may be members of the current RCM community of students and teachers, or music lovers in general in the GTA as well as internationally.
Development	RCM's development group is focused on fundraising activities including regular donations from individuals and major gifts from foundations and corporate sponsors.

Please See RCM's Websites for more details:

- RCM's homepage: www.rcmusic.ca
- RCM Examinations: www.rcmexaminations.org
- The Frederick Harris Music Company: www.frederickharrismusic.com
- Learning through the Arts: www.ltta.ca
- National Music Certification Program (US-based):
<http://www.nationalconservatoryofmusicofamerica.org/>

Please see the attached Appendix C for further information on RCM's current IT capabilities

3. DIGITAL MEDIA PROJECT OBJECTIVES

RCM's digital media strategy is a key part of the organization's overall objective to grow new revenue streams and pursue geographic expansion for RCM programs and services.

The objectives of developing RCM's digital presence as part of the digital media strategy are to:

Digital Media Strategy Objectives	Benefits Delivered to Customer	Example Technologies
1. Create resources and a professional development forum for Teachers (Canada and U.S.)	- Enabling teachers to more easily connect both with each other and students - Making teaching resources more available and accessible	- Online teaching platform - Discussion / Message boards
2. Enhance music resources for Students, Alumni, Performance Patrons and the Music Community	- Offering diverse and interesting content - Growing access to a connected RCM community - Providing access to RCM trusted expert's ideas and opinions - Promoting new programs - Merchandising	- Streaming or downloadable video and audio - Blogs - Forums or message boards - Online community group creation
3. Support examination candidates	- Allowing information sharing among students, parents and RCM - Making available past information such as practice exams or tips and tricks to help students better prepare for exams - Opportunity for feedback for RCM	- Forums or discussion boards - User-generated content and uploads - Interactive feedback / online coaching
4. Expand learning and music education for students (Canada and U.S.)	Enrolment in courses or added educational content to existing courses online for a broader group of students	- E-learning platform - Web hosting - Educational flash games
5. Enhance access to RCM and make it easier to work with RCM	- Easy access to online registration and results for examinations - Easy to find online information and resources - User feedback forums	- Enhanced web portal - Electronic registration and e-commerce payment options

6. Enhance Brand Image and Fundraising for Sponsors and Donors	▪ Connect with the RCM community and individuals on existing social networks ▪ Raising the profile of RCM on existing websites and their partners	▪ Community management ▪ External applications ▪ Online web user communities - Imbedded video ▪ Database marketing
7. Enable collaborative creation by students and teachers	▪ Leverage online applications to allow students to collaborate online, geographically unconstrained ▪ Ability to obtain feedback from teachers / peers	▪ Forums or message boards ▪ Online community software
8. Develop relationships with arts entertainment patrons	▪ Quality entertainment ▪ Inspiration to pursue further learning and education	▪ Digitization of performances ▪ Video / audio streaming ▪ Database marketing

4. PROJECT DETAILS AND REQUIREMENTS

The following sections address the functionality expected from a proposed solution. There are 4 specific systems or platform areas of functionality:

1. A content management system (CMS)
2. E-commerce capabilities
3. A social networking platform
4. Membership management

The proposed solution should also include a *high-level* plan to transition current RCM digital properties onto the new, unified system. Detailed planning for this transition (with dates) will be completed during the planning phase after the selection process is completed.

It is a paramount requirement that the four components listed above be fully interoperable preferably with published APIs and/or standard web services. Vendors must provide the *required* functionality of all four components. Subcontracting of partnerships to provide the four components is acceptable as long as there is one point of contact for the system (more information on partnerships/ subcontracting is provided later in this document). RCM's timelines for this project are very aggressive: *substantial portions of the system must be designed, implemented, tested and moved into production before the end of the calendar year.*

A. CONTENT MANAGEMENT SYSTEM

RCM is looking to move from its current systems to a unified, scalable, user-friendly content management system. This system will bring together the separate RCM web properties and provide a single back-end infrastructure to manage and update them. *As part of the project, current web properties will need to be migrated onto the new CSM system.*

EASE OF USE

Functionality	RCM Description
<i>Required Functionality</i>	
Friendly URLs	Improves user experience and search optimization. URLs with keywords versus variables. e.g. rcmusic.ca/events vs. rcmusic.ca/cms.php?id=12
Spell Check	Identify and suggest revisions for spelling and grammar errors in primary English language. [Optional] Support for multiple languages.
Subscriptions	Allow users to subscribe to protected content, allows for recurring subscription revenue. Subscriptions and paid-content should have the capacity to be set at the document/ file level.

Functionality	RCM Description
Undo / Redo	Undo or redo the most recent change. [Optional] Maintain a history to support multiple undo.
WYSIWYG Editor	Allow rich formatting of web content, simple integration of images and media. WYSIWYG editor should allow basic image settings (alignment, padding, etc).
<i>Optional Functionality</i>	
Font Updates	Allow custom fonts to be easily uploaded and used in the CMS.
Drag-N-Drop Content	Allow content to be re-ordered via drag-and-drop, or optionally dragged from user desktop.
Server Page Language	Update default messages on error pages to be more user friendly.

SUPPORT AND DEVELOPMENT

Functionality	RCM Description
<i>Required Functionality</i>	
Commercial Manuals	Written or video documentation on common administrative functions.
Commercial Support	Support available from commercial providers knowledgeable in product.
Commercial Training	Training available from commercial providers knowledgeable in product.
Pluggable API	API available for custom integration. [Note] Review scenarios for potential API integration to ensure they are supported.
<i>Optional Functionality</i>	
Developer Community	Robust developer community, existing modules and add-ons to reduce custom development.
Online Help	Help available from commercial provider through online source - Live Chat, Knowledgebase. Online help should be able to provide metrics on highly searched help terms and topics.

Functionality	RCM Description
Public Forum	Public forums available to discuss product.
Users Conference	Regular user conferences to exchange best practices and development efforts.
Public Mailing List	Public mailing list for troubleshooting or best practice exchange.

SECURITY AND PERMISSIONS

Functionality	RCM Description
<i>Required Functionality</i>	
Audit Trail	Review when content has been updated, by whom, and revert to a prior version if necessary. Errors or omissions can be easily corrected.
Content Approval	Specify workflow for content approval by trusted editors. Allows more junior administrators to update the web site with a checkpoint for quality and accuracy.
User groups	User groups should be able to be setup with security settings, and then a user is created and assigned to one of the predefined user groups. New user groups should be able to be created quickly and easily.
Granular Privileges	Allow administrative privileges to be set not just by administrative group but also by username. Privileges should be able to be set by username down to the field level.
Sandbox	Supports a separate test environment for training and to stage new features prior to deployment.
Problem Notification	Log errors (page not found, server error) and notify an administrator.
Session Management	Manage user authentication, maintain appropriate level of security in authentication.
Single Sign-On	Allow users and administrators to access all RCM services from one common login name and URL.
SSL Secured Pages	Encrypt transmission of sensitive user data to prevent interception.

Functionality	RCM Description
<i>Optional Functionality</i>	
LDAP Authentication	LDAP Authentication for administrators. and users in the RCM organization. Single Sign On should be able to be referenced by existing internal databases.
Login History	Show administrator their last login, allow administrator to review administrator activity. Important for security and productivity reviews.
Versioning	Application versioning, options to roll-back application and modules to prior versions.

PUBLISHING

The chosen platform must support several publishing types.

DIGITAL MEDIA

RCM has a rich tradition of music and arts education, and is looking to offer its resources and content digitally to a wider community. The proposed solution must support the storage and distribution of digital media.

Functionality	RCM Description
<i>Required Functionality</i>	
Audio and Video Media	Simple wizard for RCM administrators/internal staff to upload digital audio and video
Embedded Media	Media stored externally (Flickr, Youtube, etc) should be able to be viewed in the RCM application without leaving the site.
Digital Rights Management	Security is integrated to protect content and intellectual property from illegal or unauthorized access, distribution, modification and use
Media Storage	Allow media to be stored on either an internal or external service such as AS3 or Brightcove for affordable disk space and bandwidth.
Streaming and/or content delivery	Content can be published and delivered across various social media or web platforms from a single location/source.
<i>Optional Functionality</i>	

Functionality	RCM Description
Common Login	Protect content and allow login from the common RCM login.
Interactive Media	Selected content should be interactive with the user, so questions and other content can be posed to the user while audio or video is playing.
Commenting/ Collaboration	Audio, video, and images can be commented on if designated by the site administrator. Commenting should be a configurable setting.
Subscription Management	Manage paid subscriptions and access to different content.

ADVERTISING

The myDigitalRCM initiative is designed to open new opportunities for RCM partners and sponsors. The ability to deliver targeted marketing and track the response will be important.

Functionality	RCM Description
<i>Required Functionality</i>	
Text Advertisements	Text advertising format.
Image/Banner	Image and banner advertisement format.
Video Advertising	Video and flash advertisement format.
<i>Optional Functionality</i>	
Customer Segmentation	Marketing can be personalized and targeted to user segments or underlying page content.
Email Marketing	Delivery of e-mail prompts, e-mail marketing delivery, or integration with Exact Target.
Media Pre-Roll Advertising	Display advertisements as audio or video pre-roll to Digital Media content.
Mobile Advertisements	Display mobile-compatible advertising or SMS prompts.

Functionality	RCM Description
Facilitate Customer Research	Track and dashboard key myDigitalRCM segment statistics relevant to sponsors.
Online Customer Survey	Collect survey responses on myDigitalRCM participants.

As part of the project, current web properties will need to be migrated onto the new CSM system.

CMS PLATFORM - GENERAL

Category	Description
<i>Required Functionality</i>	
Advertising Management	Manage advertiser accounts, advertising delivery, campaign tracking.
Content Construction	Allow the users of the CMS to quickly define new content types quickly and easily.
Modular Design	Sections of the CMS should be modular. If there is not a module published to a certain section of the site, the module should collapse. If there is content published to a given module of the site, the site should expand to allow its view.
Configurable Columns	Pages will display columns if there is content published. If not, the columns will not appear. All of this should be configurable in the CMS backend.
Content Staging	Allow administrators to create and review content without public online view.
Environment Setup	Setup different environments for Development, QA/ UAT, and Content Validation to test functionality and/ or content before being pushed to production.
Content Syndication (RSS)	Users can subscribe to and follow content via RSS, Atom and other syndication standards. The user should be able to subscribe to the content division level.
Mobile Content	Management of mobile-compliant web content. Maintain mobile design templates and navigation. Identify mobile users by browser.
Navigation	Web site navigation can be managed. Navigation should be simple and straightforward, with a maximum of 3-layers to get to any piece of content.

Category	Description
Page/ Content Additions	New menu items and pages should be able to be seamlessly added/ subtracted on the fly by designated users.
Online Administration	Content can be managed online via web browser versus a desktop application? Allows more cost effective deployment and updates.
Search Engine Optimization	Review extent of content optimization for search. Recommend search friendly URLs, page title, meta data, headers, image alternate text, on-page links and off-site links. The page should also be constructed in a design where the main content loads before the ancillary columns of the page.
Site Maps	XML and user-friendly site map of RCM and user-generated content.
Sub-sites / Roots	Multiple URLs and visual designs (example: LTTA) are supported through the same platform. [Note] Are there additional licensing fees? Setup fees?
Themes / Skins	Template based design to support efficient modification of web site styling. Content should remain entirely separate from design.
Web Statistics	Integration with statistics equal to Google Analytics. [Note] Statistics should also monitor SSL secured content and multiple domains. Ideal to access from within administrative panel. Also identify reports in addition to Google Analytics. Analytics application should support the user setting up campaigns, what metrics fall into those campaigns, along with alerts when campaigns have been met or falls below a designated setting.
Web Site Search	Web site search, including searchable documents and attachments. Search should be configurable to extend the search out to the www, or confined to the RCM site and subdomains.
Compare Changes	Compare different versions of the content, so the approver/ publisher can quickly identify the changes.
Workflow Engine	Create workflows for content creation, editing, approval and publishing. Administrators are notified of outstanding tasks in workflow.
<i>Optional Functionality</i>	
Content Scheduling	Schedule content publishing at a pre-defined time. Allows regular release of content at manageable intervals for end users.

Category	Description
AJAX Web Site Search	AJAX web site search to minimize the number of calls to the server. Search should be configurable to extend the search out to the www, or confined to the RCM site and subdomains.
Inline Administration	Administrators can see content on site, and click 'edit' to change.
Job Postings	Post and collect applications for job postings
Review Content	Automatic prompt to administrators to review content over a given age, to ensure it is still relevant.
Surveys	Post and analyze results of user surveys.
Store and E-mail Form Results	Administrators can create forms and have the contents stored or e-mailed.
Template Management	Administrators are able to modify web templates.
Translation Management	Can the platform support multiple languages to internationalize content? Does it facilitate content translation? [Note] The proposed solution must support both French and English at a minimum
Trash	Deleted content - pages and file uploads – is sent to a trash prior to permanent removal. This provides a second chance to recover content.

APPLICATION INTEGRATION

Functionality	RCM Description
<i>Required Functionality</i>	
Accounting System	E-commerce and donations bring appropriate information to accounting department for automated record keeping
Data Warehouse / CRM	User actions (event registrations, donations, etc.) update their profile in the Data Warehouse and CRM. Relevant data feeds integrated into the Data Warehouse
Digital Media Platform / DRM	Common login to manage access to digital media [Optional] Recommend content tailored to user segment

Functionality	RCM Description
Exact Target Mailings	User signup can create/populate/cross-reference a profile in Exact Target
Legacy Systems [Other]	API or source code access to write custom hooks to legacy applications as required.
<i>Optional Functionality</i>	
External Social Network Integration	Create content on external social networks, recommend RCM social media content to users based on user segment
Invoicing	Send, receive, and track invoices online.
Payroll	Integration with internal payroll systems to provide a common dashboard view of data.
Patron Edge – Ticketing	Visual style integration, common login, common template and navigation, potential to recommend events
Raiser's Edge - Fundraising	Visual style integration, common login, common template and navigation, promotion of donation options
Campaign Management	Visually present a fundraising campaign as a module on the page. The module could be placed on as many pages as necessary.
Social Media Dashboard	Aggregate RCM social media content and third party content to analyze trends and respond

B. E-COMMERCE CAPABILITIES

While the CMS is focused on developing a new web presence for RCM with enhanced capabilities and functionality, a second priority of this digital project is to expand RCM's reach into its customer communities and develop new revenue streams. As part of this new digital project, e-commerce capabilities are essential to allow RCM to pursue and develop these revenue streams.

COMMERCE STOREFRONT

Functionality	RCM Description
<i>Required Functionality</i>	
Accounting & Live Payment Gateway Integration	Can integrate with RCM payment gateway, provide appropriate information to accounting. Multiple payment methods should be available, with the capacity to accommodate multiple currencies for scalability purposes. Must support real-time credit processing.
Billing Options	Ecommerce solution must support both one-time and recurring subscription products.
User Profiles	Allowing purchasers to maintain their own profile with product preferences, shipping information, and billing information.
Store Search	Searching for a product with advance search options such as product attributes.
Simple Checkout Process	The checkout/ cart process should be simple and in a minimal amount of steps. The user should have the option to either register to purchase, or an "express" option to purchase bypassing the registration process.
Sortable/ Customizable Views	Allow the user to choose how they wish to view the products (high to low, low to high, most popular, etc). Rows should be sortable.
Backend Administration	The products must be fully configurable in the backend with the capacity to add additional attributes quickly and easily (color, size, etc.)
Inventory Tracking	Inventory tracking of store items. This should include a setting where the user can define criteria for automatic alerting when inventory falls below a defined threshold.
Customer Service Backend	RCM Customer Service should be able to easily process/ modify payments, and service and credits or chargebacks in the backend.
Images/ Video	Multiple images or video should be able to be directly tied to a product.
Product Thumbnails	Support of thumbnail images per product.

Functionality	RCM Description
Support of Major Couriers	The user should be able to select from multiple courier services with the option to ship on different time frames (7 day shipping, expedited shipping, etc)
Product Turnaround Time	Display the estimated amount of time until the purchaser receives their product.
Cross-Selling	Products should be linked in the backend to encourage and promote cross-selling opportunities in the front-end.
Previous and Current Price	Showing the previous price of an item, and showing the new “On Sale” price.
Order History	The purchaser can view their order history.
Download/ Content History	For digital purchases, the user can see their purchases in a Library where they can download the previously purchased content again if necessary.
Affiliate Management	Tracking external sites’ referrals to RCM ecommerce site.
Featured Products	The CMS should allow ‘Featured Products” to be displayed quickly and easily.
“What’s New” Product Section	Products should be able to be tagged as “new” and then appear in a designated “new product” section of the store.
“Coming Soon” Product Section	Products should be able to be tagged as “coming soon” and then appear in a designated “coming soon” section of the store.
Subscription-based Purchases	Documents and sections of the site can be accessible for a configurable duration of time, as set by the backend administrator.
Product Quantity Change at Checkout	Allowing the purchaser to change the quantity of the item in the cart. The price should automatically reflect the quantity change.
Security	Purchases should be made securely (SSL/ HTTPS).
Clear Cart	Cart should be able to be completely cleared at anytime.
Tax Calculations	Supporting both domestic and international tax calculations.
Reporting and Analytics	Reporting on product turnover, P&L, inventory, etc.
Terms and Conditions	Terms and Conditions should be a content type and should be easily configurable by a site author or publisher.

Functionality	RCM Description
Online Catalogue and Checkout	Online catalogue with one-page checkout for better conversion. Real-time shipping and taxes. Product descriptions should be easily configurable.
<i>Optional Functionality</i>	
Promotional Tools	Commerce widgets e.g. Hot products, user feedback, recommended items, related items. Ability to set promotions across items (buy an item, get the second ½ off)
Currency Converter	On-the-spot currency converter to support international purchases. A real-time interface with a currency system-of-record would need to be established.
Temporary Cart (wish list)	A work-in-progress cart/ list which contains wish-list items for the user. The list should be able to be emailed to other people for comments, or so they can purchase it for the requestor. The cart should also be able to be saved for a future reference and/or purchase.
Distribute Third-Party Content	Allow third-party providers to list their content on the RCM storefront
IP/ Geographic Blocking	Blocking certain geographic or IP addresses for making purchases on the site.
E-commerce Online Chat	Chat feature so a potential buyer can ask a customer service representative questions.
“What Customers are Looking at Now” feature	Displaying the products which current and recent customers have been viewing the most.
Messaging	The messages which the purchaser receives in the checkout process should be configurable (registration email, purchase confirmation email, etc.)
Product Combinations for Discounts	Tying together multiple products with a new discounted price of all products are purchased at the same time.
Package/ Shipment Tracking	Tracking items purchased either directly on the site or with an interface to major shipping companies.
Product Zoom	Allow zooming into a given for a more detailed view.
Product Metadata	Metadata fields per product to improve SEO.
Recommended Products	Products are recommended to the user based on previous purchasing history and site browsing behavior.

Functionality	RCM Description
Product Checkout Recommendations	Other products are offered to the customer at checkout, based on similar products purchased at the same time by previous buyers.
User Collaboration	The site visitors/ purchasers can discuss and rate available products.
Discount Code Support	Allowing the product to be discounted via a code entered by the purchaser.
Fraud Detection	Business rules which determine possible fraudulent activity, and causes temporary holds on subsequent purchases. Customer service is automatically notified.
Product Hierarchy	The products should be able to be set in a hierarchy in the background as parent-child relationships. Therefore, a series of products can be featured by setting the top of the product hierarchy and have that cascade to all child products.
Unlimited Product Categories	Products should be able to be defined under a category content type. One product should be able to have multiple categories.
Product Backorders	Listing when a product is currently out-of-stock with the functionality of auto-alerting the customer once the item is back in stock.
Lead Tracking/ CRM Integration	Interface between the CRM and ecommerce solution to track customers for cross-selling opportunities.
Printable Versions of Product Sheets	Printable PDFs which contain detail about a given product.
Incomplete Order Tracking	Track abandoned orders for customer service to follow-up
Gift Certificates	Supporting purchasing and sending electronic gift certificates.
License and Wholesale Content	License and wholesale RCM content e.g. Wholesaler status, preferred pricing, account-based payments.

C. SOCIAL NETWORKING PLATFORM

The RCM realizes that the most important elements of a social community are in the execution – useful content, messaging, excitement and creating an emotional attachment. However, the technical building blocks are still required in order to develop a RCM social network.

The RCM social community will begin with teachers and examiners, with the intention to extend more broadly to other groups (e.g. alumni) without significant upgrade.

SOCIAL NETWORK

Functionality	RCM Description
<i>Required Functionality</i>	
Chat	Allows live discussion among authenticated users.
Connect and Follow Users	Users can connect to other users and follow their myDigitalRCM activities.
Discussion / Forum	Threaded discussion by topic for authenticated users. [Optional] Public SEO-friendly and private views of discussion content.
Events Calendar	Users can create and maintain their own events and group events.
Groups and Discussions	Users can create and join groups of their peers to discuss common interests.
Instant Messaging	Users can send inbox-style instant messaging.
Mobile Access	Limited access to follow and comment on social network features via mobile devices. Ex/ Smart phone, SMS, etc.
My Page / Dashboard	Customized landing page displaying the activities of a user's social network.
Privacy Restrictions	User can control who can see them, and what updates are sent to their network.
Social Search	Users can search users, groups, events, blogs and other social content.

Functionality	RCM Description
User Commenting	Users can comment on other users and content on the social network.
User Generated Content	Users are provided tools to contribute to the myDigitalRCM presence.
User Profiles	Users can maintain their own profile, including a profile image and key details.
<i>Optional Functionality</i>	
User Blogs	Allow users to create their own blogs or syndicate outside blog content.
Classifieds	Users can post buy/want/sell classified ads to the social community.
Contact Management	Users can manage outside contacts through the social community.
Photo Gallery	Users can upload images and share them with their peers. Users can import external photo galleries.
Polls and Surveys	End users able to create polls of their connections / relationships.
RSS Reader	Users can aggregate feeds of outside RSS content and review regularly updated content.
Wiki	Users can establish and contribute to structured Wikis about relevant topics.

SOCIAL MEDIA AND BLOGGING

Functionality	RCM Description
<i>Required Functionality</i>	
Facilitate Content Creation	Create blog entries via WYSIWYG editor.
Commenting	Blogs and content can allow commenting. Commenting should be a configurable setting. Commenting includes CAPTCHA to discourage spam.
Blog Workflow	Comments can be set to be auto-published without intervention of an administrator or be set that comments require approval from an RCM resource before being

Functionality	RCM Description
	published on the site.
Facilitate Internal and External Blogging	Aggregate RCM-managed feeds from key social networks. [Optional] Support for external guest or column bloggers, and aggregate popular user-submitted content.
Monitor Participation and Feedback	Identify participation trends and top participants. Reward top participants.
Social Media Dashboard	Dashboard view of key social media statistics.
<i>Optional Functionality</i>	
Feature Social Media by User Segments	Match social content to user segments (RCM social network, 3rd party social network) based on tags and common interests.
Host Conversations, Community, Connections	Live town hall discussions with moderator.

EVENT PROMOTION

Events are currently separately handled by business units. While the scope of this RFP does not include specific event calendar and promotion capabilities, any functionality already included would strengthen the applicability of any proposed solution.

Functionality	RCM Description
<i>Optional Functionality</i>	
Social Sharing	Disseminate through MySpace, Twitter, Facebook, and other social media.
Event Registration	Register for an event online, with the ability to pay for admission on the site.
Attendance Counter	Display the number of event attendees, with the number of open spots still available.
Refer-a-friend	Allow users to e-mail an event to their friends or a reminder for themselves.

Functionality	RCM Description
Facilitate Event Process	Workflow to distribute events to multiple RCM contacts, or receive from social intranet.
Event Recommendation	Identify relevant events and market directly via callouts and e-mail marketing.
Display Calendars	Departmental calendars by topic (alumni, school, performances).
Aggregate Calendars	Support departmental calendars plus aggregation of events into one common RCM calendar.
Linked to Patron Edge	Visual style integration, common login, common template and navigation, potential to recommend events.
RSVP Requests	Administrators can create forms to record RSVPs.

D. MEMBERSHIP MANAGEMENT

RCM engages with a large and varied community of music and arts patrons. Proper gathering of user information and linking that information to a more personalized experience is an integral part of the myDigitalRCM platform.

CUSTOMER SEGMENTATION

Functionality	RCM Description
<i>Required Functionality</i>	
Update Customer Database	Update CRM and pass information to data warehouse on key actions
Personalized Content	Ability to customize content blocks by user segment to delivery more relevant content.
Single User Log-in	To provide a unified customer experience, users need to be able to access RCM's digital platform with a single user-log in, which links with the various business unit databases and currently disparate customer records [Note] This may involve linkages to existing user data and databases.
<i>Optional Functionality</i>	
Identify Segments and Champions	Data or algorithm to help identify similar users and influencers.
Update Customer Database	Update CRM and pass information to data warehouse on key actions

ALUMNI RELATIONS

Functionality	RCM Description
<i>Optional Functionality</i>	
Contact Update	Use web site functionality to prompt and update alumni contact information.
Alumni Events	Display alumni events and linking to the events management section for registration and payment.
Segment Alumni	Segment alumni and deliver marketing messages to determine which convert best.

Functionality	RCM Description
Facilitate Donations	Simple facilitation of donation types, recurring and one-time, and corporate matching.
Connect with Alumni	Tools to communicate with and attract alumni, including e-mail, SMS and fax.

CUSTOMER SERVICE

The myDigitalRCM Social Publishing Platform should be able to support better customer service for RCM across its business units.

Functionality	RCM Description
<i>Required Functionality</i>	
Customer Service Online	User-focused support service via ticketing and chat.
Frequently Asked Questions	Create knowledge base / FAQ. [Optional] Search knowledgebase for relevant articles prior to submitting a support ticket.
<i>Optional Functionality</i>	
Account Balance	Allow users to check their account balance, make payments and obtain receipts online.
Examination Comments and Marks	Allow exam performance and feedback to be delivered online. Allow bi-directional feedback.
Transcripts	Allow unofficial transcripts to be accessed online, request for official transcripts to be facilitated.

5. RESPONSE TO RFP

RESPONSE FORMAT:

Based on your experience, please outline the technical solutions you could provide RCM. Your response should follow the following general format:

1. A summary of your approach to the project with a clear outline of the solution provided and the business reasons that make your proposal attractive (max 5 pages)
2. An explanation of how your solution achieves the stated objectives of RCM's digital media strategy. (max 2 pages)
3. What type of both tactical and strategic management is provided throughout the project? What types of project management deliverables will be offered throughout the duration of the project? (max 2 pages)
4. Explain what, if any, user and stakeholder research is involved in your analysis? (max 1 page)
5. Explain your experience and approach to information architecture and information design. (max 2 pages)
6. Explain your process (high level) in migrating an existing site to the newly developed site. (max 2 pages)
7. List the deliverables that you will provide to RCM throughout the engagement of the project. (max 6 pages)
8. A clear break-down of the technology used in your solution (max 20 pages)
 - a) What goals (for both RCM and/or the overall project) will each piece of technology achieve, and the reasoning as to why this particular technology was selected. This should include, but is not limited to the following:
 - A high-level description of a proposed web design treatment that takes into account site objectives and navigation concerns
 - Outline the content management system with its capabilities and platform, detailing the supported programming languages
 - Outline the capabilities for social networking, e-learning, information sharing, collaboration, and knowledge management
 - Explain the web 2.0 tools and social networking strategies which will be or could be implemented at a later time which would help engage the larger RCM community (teachers, students, patrons, donors, etc).
 - Explain the different e-commerce solutions you have worked with for previous client engagements, and which you would recommend for the Royal Conservatory of Music. What types of additional variable and fixed costs are associated with your recommended e-commerce platform?
 - What types of risks do you foresee with the RCM solution, and what are steps you would take in order to minimize and rectify those risks.
 - b) What is the timeline for implementing each technology used in your solution (short, medium, longer-term)? Please outline any dependencies or sequential implementation requirements. Note that the RCM's timelines are very aggressive; substantial components of the system need to be operational before the end of the year.

4. Costing which follows the three-tiered approach outlined below
5. Please provide an explanation of how you document or convey the style elements used in the design? Is a style guide presented to the client?
6. Outlining of information about yourself and how your experience and skill set is applicable to this project. Please see the attached Appendix A for more detailed experience questions.
7. Please provide sample wireframes and design comps either for the proposed RCM solution or samples from past work.
8. Please provide an explanation of your QA testing process. Is there a dedicated QA team? If so, where is the QA team located? Is there any use of automated testing? If so, what applications and utilities are used?
9. Please provide an explanation of your UAT process.

Your plan should address each of the three primary areas of focus in a way which would assist us in achieving our previously stated objectives:

1. Developing a new web presence for RCM with enhanced capabilities and functionality
2. Expanding RCM's reach into its customer communities and developing new revenue streams
3. Assessing/auditing and upgrading, if required, existing systems based on the requirements of implementing areas 1 and 2

PROJECT COSTS/PRICING:

Please provide pricing based on a tiered approach that pricing to fulfill the required functionality described above and, if desired, a separate pricing scenario which includes optional functionality (please specify which costs are associated with which optional functionality). Please also outline the timing required for each phase of the project and for each of the three scenarios proposed.

The following pricing table is intended as a template only and if additional rows or explanation is required, please do not hesitate to include further information. Clear and detailed pricing ensures the proposed solution is understood and can be assessed appropriately.

If the execution of the solution would require the hiring or sub-contractors or the purchase and implementation of third party software, this should be identified and the associated costs clearly identified.

Investment	Description	Required	Optional
Creative	Initial visual design, on-page content, translating design to HTML/CSS template.		
Licensing Fees	Licensing fees payable to provider.		
Platform Deployment	Deployment payable to provider or Value-Added Reseller (VAR).		
Content Transfer	Transfer existing content, copyright and deploy new content.		
Custom Development	Customization or API integration to meet myDigitalRCM specifications.		
Application Integration	Integrating the platform (source code or API) with other applications.		
Third Parties	General project and content advisory, strategy.		
Training	Initial training for RCM, license training resources.		
TOTAL		\$ _____	\$ _____

ONGOING COSTS

Investment	Description	Required	Optional
Hosting	Ongoing hosting fees and security auditing.		
User Support	Telephone, e-mail or knowledge base.		
Maintenance and Upgrades	Ongoing software updates and custom development.		
Training	Training fees and ongoing skills improvement.		
Creative	On-page visual design and creative.		
Content Development	Ongoing advisory on content development and structure.		
Application Integration	Ongoing integration of platform with other applications.		
TOTAL		\$ _____	\$ _____

TECHNICAL CONSIDERATIONS:

The website should be compatible with all common operation platforms and browsers. The proposed solution should allow for a customizable and extensible application platform (ex: accepting plug-ins from the Google API, Blogs, Forums, etc). It should also allow for updates to be made by internal staff with limited knowledge of html or web programming.

Recommend strategies to encourage online collaboration, self-publishing, online community building utilizing a wide range of interactive tools, and plug-ins, and explain how the recommended solutions will meet the previously stated objectives.

Please illustrate strategies to ensure existing and future web content is optimized to get maximum exposure on major search engines.

Please see the attached Appendix B for further technical questions to address

6. RFP PROCEDURE (DATES) AND LEGAL NOTICE

Please read this section very carefully:

1. Vendors intending to submit a proposal must notify the RCM of such intention before **Friday, May 7 (2010)** by email to the Chief Information Officer, **Gerry Dimnik (Gerry.Dimnik@rcmusic.ca)**. Vendors may decide at any point before the final submission date to withdraw their intention to submit a proposal.
2. All enquiries related to this project must be directed in writing via e-mail to the Chief Information Officer, **Gerry Dimnik (Gerry.Dimnik@rcmusic.ca)**.
3. Any **questions** regarding the RFI should be submitted by e-mail no later than **Wednesday, May 12 (2010)** . If the questions and/or answers necessitate a change to this RFI, an appropriate addendum will be issued to all contacted vendors.
4. The vendor must submit two hard-copies as well as a soft (digital) copy of the proposal via e-mail by to the same email address **on or before 5 PM Tuesday, May 18, 2010**

Vendors submitting information do so entirely at their own expense. RCM will not reimburse vendors for any cost incurred in preparing or submitting proposals.

Once the final project has been completed and accepted, all designs, systems, content, software, and architecture will become property of the RCM, or will be operable by the RCM under appropriate end-user licences.

Vendors must bid on the entire RFP; the RCM requires the components described above to work together seamlessly as a system. Vendor may subcontract a portion of the system.

LEGAL NOTICE:

The vendor shall keep all information and materials pertaining to this project confidential and may not release any information without the prior written approval of RCM. The vendor must not respond to inquiries or questions from any member of the public or public media representative. All queries must be referred to RCM. The vendor will not provide information, or communicate in any way with any member of the public or public media concerning this project.

Any publicity or press releases with respect to this request for information shall be within the sole discretion and control of RCM. RCM shall take all reasonable steps to acknowledge the proponent / vendor as may be appropriate in any such publicity or press releases. The vendor shall obtain prior approval from RCM before making any information public with regards to this assignment, both before and after completion.

SELECTION PROCESS:

Proposals will be scored on criteria including, but not limited to:

- Design and architecture of the system
- Proven experience and demonstrable depth of expertise in Web 2.0 and ecommerce systems
- Ability to meet timelines
- Functionality (ability to meet requirements)
- Cost, both one-time and on-going
 - The lowest tender will not be automatically selected
- References

The vendor with the highest overall score will be selected as the preferred vendor and will be asked to negotiate a contractual agreement for the fulfillment of the goods and services detailed in this Request for Proposal with the RCM. If for any reason, a contract is not able to be negotiated, the RCM may contact the vendor with second highest score.

The RCM reserves the right to reject any or all proposals.

APPENDIX A. VENDOR EXPERIENCE QUESTIONS

VENDOR EXPERIENCE:

- Please provide a summary of your company, including;
 - a. Management structure and team
 - b. Summary of services and products
 - c. Length of time the company has been operating
 - d. Client billing structure
 - e. Financials for the past 3 years
- Describe your experience with projects of a similar scope? Can you provide references, case studies, and testimonials from satisfied clients?
- What percentage of your work is from repeat customers?
- What experience do you have integrating other website technologies, third party software tools and applications into web development projects?
- What experience do you have with User Experience/ User Centered Design methodologies and practices?
- What specific programming features, online tools and applications have you developed for other clients? Please provide details about the features developed and how these were implemented with other clients.
- What experience do you have with CMS, membership management, social networking and eCommerce implementations?
- Do you provide search engine marketing, e-mail marketing and optimization services (i.e. paid keyword placement and search engine optimization)? If so, please specify what services.
- Do you provide consulting and recommendations for the website development project? If so, please specify what services.
- Do you provide in-house production capabilities and content development assistance? If so, please specify what services.
- Do you provide custom themes and designs in content management, or are they themes and designs considered off-the-shelf?
- Please provide an explanation of different training approaches you have used with previous clients, and which you would recommend for the RCM.
- What experience do you have consulting and coordinating with your clients' IT teams?
- Please provide detailed CVs of the team members which would be involved on the project.

APPENDIX B. VENDOR TECHNICAL QUESTIONS

TECHNOLOGY & PROGRAMMING:

- What specific programming features, online tools and applications would you implement in this project?
- What level of interactivity, graphics and rich media content would be provided?
- What level of experience do you have with Rich Internet Applications (RIA), such as Flash or Flex?
- What types of content management tools or programs would be incorporated?
- Please describe if and how your sites are constructed to be search engine optimized?
- Will you custom program the project to the RCM's needs?
- Will you use "off-the-shelf" software packages? Will these packages require upgrades, development patches and licensing fees for programming?
- What experience do you have with management and implementation of open-source technology applications and platforms?
- What type of development process would be used?
- What experience do you have allowing the client to define the different sections (or "divs") on a content management platform?
- Are your developers full-time employees or contractors? How long have the proposed team members been involved with your company?
- Do you provide detailed code walkthroughs and reviews with your client?
- Please describe your transition process for a technical hand-off back to RCM once the project is near completion.

HOSTING CAPABILITIES:

- Does your company provide web and other system hosting services?
- Please provide the hosting statistics of your hosting solution (uptime, etc).
- Please define the Host System architecture that you would recommend.
- What type of database does the host system utilize? Please list all that are supported.
- What software applications are included with the host system?
- Provide and describe the system backup and restore capabilities.
- Describe the security applications of your web hosting system? What security measures are in place to prevent unauthorized access?

SYSTEM MAINTENANCE AND SUPPORT:

- Outline your system support center services and response times.
- What portion of your core development and project management team will be part of the support team, if applicable?

APPENDIX C. RCM CURRENT IT CAPABILITIES

RCM's current IT environment can be separated into two components, the "front-end" and the "back-end". The front-end is primarily the two servers which are located externally and handle web traffic and client information flows. The back-end is physically located within RCM and runs off basic Cisco servers, handling functions such as the phone system, e-mail, ticketing services, etc. The front-end server database is used to populate the back-end systems. However, there are also front-end customized applications which can pull the updated data from the back-end systems.

The back-end systems are coded primarily in RPG while the front-end systems utilize current web programming languages. Much of the connecting programs were created using custom JavaScript.

SERVER CONFIGURATION:

RCM utilizes one IBM I-Series server running an I5 operating system along with a separate web server which hosts the RCM and US websites. Both are co-located in a TELUS datacenter.

The IBM I-series server is separated into 3 partitions:

- The RCM Toronto school's back-end systems
- The Mississauga location, RCM Examinations and Fredrick Harris Music Co. back-end systems
- The web server for the RCM Examinations and Fredrick Harris Music Co.

RCM WEBSITES:

The RCM websites are hosted on a partition of the I-Series server and a separate server both running Apache, with the WebSphere Express v6.1 software. Currently the sites utilize approximately 1200 separate files. Usage for the websites is seasonal (especially for RCM examinations), with peak times being Jan-Feb, June and Sept-Oct. Load on the site in June is approximately double the requirements in other peak times, and 4-5 times the requirements of regular months.

Jan – Dec 2008	RCM	RCM Examinations	Fredrick Harris	US website
Total hits	17,497,647	66,374,344	4,521,619	2,262,346
Total page views	6,588,462	10,433,346	581,898	261,458
Avg. pages / user	16.22	9.43	4.98	4.4
Bandwidth / day	n/a	1.17gb	225.75mb	49.86mb

RCM EXAMINATIONS:

The RCM has been offering online registration for examinations since 2000. The RCME online registration site has about 600,000 unique visitors per year, representing the majority of total RCM web traffic. The system runs its own partition on the IBM I-Series

server. The software was developed internally using RPG programming. The system has evolved over the years and today has the capability to take online registration applications and electronic payments, allow piano exam candidates (approx 85% of total) to sign up for their own exam time online and allows teachers and students to track progress of there exam results. The examinations business serves approximately 100,000 candidates per year across Canada and a small number in the U.S. Examinations students' data is stored in a DB2 database. Each exam student is assigned a unique ID number that is only used in the examinations segment of the business.

RCM COMMUNITY SCHOOL AND GGS/YAPA:

The RCM School runs a separate system for registrations on its own partition on the server, which runs software developed internally to manage student registration in courses delivered by the RCM. The ability to do online registration and payments was implemented in 2007 for the 2008 courses. The functionality of this system is slightly different from the examinations system, but the technology is the same. The two systems both interact with the financial accounting system, but they do not share any customer data. Each student in the school has a unique ID number that is only used in the School segment of the business. The school is based in two locations in the GTA and has about 4-5,000 students per year and the data about these students is collected and stored separately from examinations students but is also stored in DB2 on the server.

RCM DEVELOPMENT AND PERFORMANCE DEPARTMENTS:

The Development department uses The Raiser's Edge software for fundraising and the Performance department uses Patron's Edge for ticketing for upcoming events in the new performance centre. This program is run on a large PC and is maintained separately from all other systems except for financial data which is collected from sales and donations.

FINANCIAL/ACCOUNTING SYSTEMS:

The current ERP system in place called "Maestro", which interfaces with the systems for each business unit to collect financial data. Currently the organization does not have a CRM system or a central database of customers.

Appendix A

Royal Conservatory of Music GENERAL TERMS AND CONDITIONS

1. **Established Process** – No bidder shall receive information not equally available to all bidders. During the period between tender issuance and receipts, Bidders shall be prohibited from contacting any other than the names shown in this tender document, about any matters related to the tender request;
2. **Copies Required** - Each bidder is requested to submit 3 copies of the completed tender documents. Electronic submission (pdf or MS Word) will be accepted.
3. **Address to:** - Tenders must be sealed and delivered to Gerry Dimnik, CIO Development Officer, The Royal Conservatory 273 Bloor St W, Toronto, ON M5S 1W2 Tel: 416-408-2824 x.303 Email gerry.dimnik@rcmusic.ca
4. **Conflict of Interest** - Bidders must disclose in writing all gifts, grants, research funding, free products, monies donated for education or conferences, equipment on loan to the Royal Conservatory or employees therein. Disclosure must accompany the tender submission.
5. **Pricing** – will include both low and high estimates.
6. **Tax** - Provincial Tax and Goods and Services Tax will be shown separately.
7. **Tender Acceptance** - Lowest or any tender will not necessarily be accepted
8. **Vendor's terms and conditions** - must be clearly stated. Where the Vendors terms are in contradiction to those stated here, the Vendor must state the discrepancies in writing to the Royal Conservatory along with their Tender response.
9. **Value Added** – State value added by purchasing products through your company.
10. **Green Policy** – State clearly environmental friendly policies which your firm practices that minimizes pollutants and contributes to a responsible green management program.

11. **Indemnity clause** The successful bidder shall indemnify and hold the Royal Conservatory and its agents and employees from any claims or proceedings by third parties resulting from bidder's performance or lack of performance.
12. **Dispute Resolution Mechanism** At the time a difference of opinion arises over contract obligations the first step is to inform the Director of Materials Management verbally of the details and then to confirm the verbal details and the recommended resolution in writing. The Director of Materials Management will then arrange a meeting of all stakeholders representing both parties at a mutually convenient time. Laws of Ontario will govern any legal proceedings.
13. **Termination** – If the Royal Conservatory deems that the Vendor has misrepresented themselves, or fails to uphold their portion of the agreement, the Royal Conservatory may terminate said agreement with no penalty
14. **Compliance** Successful bidders shall be in compliance with all relevant Government of Ontario Laws, Codes and Regulations.

Please sign and return a copy of these **TERMS AND CONDITIONS** along with your Tender Response indicating you have read and are in agreement with the **14** GENERAL TERMS AND CONDITIONS stated here.