

REQUEST FOR PROPOSAL
WEBSITE & DATABASE DESIGN & DEVELOPMENT



February 17, 2012

Contents

1. SUMMARY	3
2. PROPOSAL GUIDELINES.....	3
3. ABOUT THE ORGANIZATION	3
Our Mission	3
Products and Services Overview:	4
4. PROJECT GOALS & OBJECTIVES.....	4
Purpose.....	4
Project Description	5
5. SCOPE & GUIDELINES	5
Overview.....	5
Website Requirements.....	6
Database requirements.....	7
Testing, Training and Sign-off.....	8
In-House Resources	9
Graphic Design.....	9
Technology Profile	9
6. TIMELINE	10
7. BUDGET	10
8. QUALIFICATIONS	10
9. CONTRACT TERMS	11
Appendix A.....	12
Appendix B	13

1. SUMMARY

Imagine Canada (www.imaginecanada.ca) is inviting proposals to design, develop and host a bilingual website and database that will be an online resource centre for Canada's charities and nonprofits. This project will combine the current content of various web properties at Imagine Canada, providing the bulk of our information and knowledge products in one location and making it easier for our stakeholders to find the resources they need. The majority of the content will come from the existing Nonprofit Library website (<http://library.imaginecanada.ca>), originally designed and produced in 2007 and modified in 2010 (see screen prints attached in Appendix A). In addition to a website interface, the new site will hold at least one online searchable database that is currently in the form of a library catalogue and connected to the Nonprofit Library website via this link (<http://ic.andornot.com>). Though all the content components exist currently on our various web properties (currently built on a Drupal CMS), this project is major reconceptualization of our various websites and therefore we require a new website construction.

2. PROPOSAL GUIDELINES

The primary objectives of this RFP process are a) to provide an open, fair and competitive process and b) to explore alternate and various solutions. Proposals are due by 12:00pm/noon EST, Friday March 16, 2012. Imagine Canada welcomes creative proposals but we do require a project scope plan, anticipated timeline and a projected budget. The project itself is designed to prioritize two major Phases: I) Discovery, design and planning and II) Development and implementation.

If the execution of work requires the hiring of sub-contractors please clearly state this in your proposal including the work they will perform. Please provide the name, address, and business number of the sub-contractor. Additionally we will accept proposals that are offered in a partnership model, submitted by two or more vendors. Imagine Canada will not refuse a proposal based upon the use of sub-contractors; however we retain the right to refuse the sub-contractors you have selected. Similarly, Imagine Canada may choose separate development groups to address what we have identified as two separate technological components of the proposal (website and database). Proposals will not be refused if a solution to only one component is presented, as long as the developer is willing to work collaboratively with the other party selected by Imagine Canada.

3. ABOUT THE ORGANIZATION

Our Mission

Imagine Canada is a national charitable organization whose cause is Canada's charities and nonprofits. It is our mission to support and strengthen charities and nonprofits so they can, in turn, support the Canadians and communities they serve. We strengthen the sector's collective

voice; we serve as a forum and meeting place; and, provide a supportive environment for organizations to build stronger communities.

Products and Services Overview:

Our members and partners include sector networks and organizations from all parts of the sector and all regions of the country. We provide all of our services and communications in English and French and we estimate that about 10% of our audience functions in French as their primary language. All our programs, services and activities are carried out for the benefit of the charitable and nonprofit sector. For your information and to better understand our organization, Imagine Canada's major ongoing activities include:

- **Membership:** Canadian charities and nonprofits working for the greater good of Canadian and international communities. Our members support the work and vision of Imagine Canada and receive benefits in the areas of engagement, education and resources, discounts, and recognition;
- **Community Engagement:** identifying issues that affect the charitable sector and actions that can be taken to address these issues;
- **Research:** conducting original research to increase understanding of the charitable sector, charitable giving, and volunteering;
- **Public Policy:** participating in the public policy process and facilitating the participation of other charities in this process;
- **Nonprofit Library:** maintaining Canada's largest online collection of resources for and about charities and nonprofits;
- **Standards Program:** managing a program that sets standards for charities and public-benefit nonprofits;
- **Nonprofit Risk Management:** operating a risk management centre that helps charities and nonprofits improve their risk management practices and reduce their exposure to liability;
- **Canadian Directory to Foundations and Corporations:** providing a database of online service-based grants and funding of foundations and corporate funders.
- **Caring Company Program:** promotes corporate citizenship and corporate community investment.

4. PROJECT GOALS & OBJECTIVES

Purpose

Imagine Canada currently has an extensive web presence and is known as an information and knowledge provider to the charitable and nonprofit sector in Canada. The delivery of these services currently involves various web properties (websites, online searchable database, RSS feeds, social media that are operated by the various programs as listed above. We wish to bring together the content from a group of our websites (currently The Nonprofit Library <http://library.imaginecanada.ca/>, Giving and Volunteering

<http://www.givingandvolunteering.ca>, and the Nonprofit Risk Management Centre (<http://nonprofitrisk.imaginecanada.ca>) and build a new site that better reflects the organization's current goals while using the latest web technology. These websites are now somewhat outdated in their structure, use of technology and presentation of content and in general no longer represent the current knowledge mobilization goals of the organization. Upon completion of the new site, Imagine Canada will assume full responsibility for content maintenance and administration, unless other terms are agreed upon with the developers. All content, coding and graphics will become the sole property of Imagine Canada.

Project Description

The goal is to develop a user-friendly information and knowledge “hub” that can deliver large amounts of constantly changing information and knowledge products to our key audiences (see a preliminary mock up in Appendix B). Pre-authenticated users will have access to specified information not available to un-authenticated users. The site front-end will interface with a database where users can search for material in our resource collection. The back-end of the database will ideally be updated through a browser-based interface. In addition to a user-friendly front-end interface, we require an intuitive user-friendly CMS back-end interface for our personnel to easily update and manipulate the placement of key groups of content. To be effective, our website must be:

- Easy and intuitive to navigate and update
- Provide an intuitive search functionality connecting to an easily updated database
- Provide customized content for authenticated users
- Accessible design meeting the WCAG 2.0 guidelines
- Safe and secure

Specific program managers will manage web publishing processes, using a WYSIWYG system with a browser-based user interface. The website must support compliance with *the Accessibility for Ontarians with Disabilities Act*

(http://www.elaws.gov.on.ca/html/statutes/english/elaws_statutes_05a11_e.htm) through following the *Web Content Accessibility Guidelines (WCAG) 2.0* (W3C Recommendation 11 December 2008 accessed on February 5 2012: <http://www.w3.org/TR/2008/REC-WCAG20-20081211/>). Administration of web content will be based on roles to control access and work flow (e.g. author, reviewer/editor, publisher) to be decided in the discovery and development process.

5. SCOPE & GUIDELINES

Overview

The scope of this project is to create a new information site with two major technical components. Proposals should itemize and price each component separately. It is possible to

submit a proposal for either component individually. We reserve the right to accept each component as a separate entity.

Component A - A website that presents information in a dynamic user-friendly manner (through RSS feeds, multimedia embeds, and graphics). The site must allow staff to easily and cost effectively update content and modify site design after the initial launch. The site copy and content will be developed in-house by Imagine Canada's staff, with a significant amount brought over from existing web properties.

Component B - A database platform accessible to the public through a website search interface. The database must be able to contain records of various types of resources (e.g. a library catalogue, web links to community events, and a documents repository). The database must be easily updated and expandable in house. The search feature must be easy and intuitive to use, provide faceted classification and graphic features to increase successful usability.

Both components A & B should include the following two phases:

Phase I: Discovery

Working with the information management team at Imagine Canada, the developer will confirm overall audiences, objectives, graphic look and feel, navigation, database structure and layout, search logic and parameters, technology issues and assumptions, required functionality, phasing, and budgetary constraints.

Phase II: Site Development, Testing, Training and Deployment

Implementation of the specifications as determined during Phase I, including testing and time to respond to issues identified through testing. Training on using the CMS and other applications should be provided in-depth to key staff members and an overview once to a staff group. Imagine Canada's information management team will work closely with the developer on site planning, interface design and information architecture.

Additionally there will be a post deployment monitoring period for additional technical issues and required fixes. A third phase of maintenance, ongoing development and hosting will be negotiated during the engagement.

Website Requirements

Imagine Canada encourages creativity in the proposals submitted; however there are certain requirements for the website project. The website designed by the successful candidate must meet the following criteria:

- Built on a content management system that will permit non-technical staff to easily update website content (WYSIWYG editor) and modify limited structural elements of the site (e.g. menu order, side bar items, header/footer).
- The CMS should provide bilingual functionality e.g. "translate" pages – English and French.

- The CMS should provide basic reporting capabilities for specific functions e.g. dead URL checking. To be determined during the Discovery phase.
- Site must be compatible with the most current browser versions.
- Site must be built in accordance to the Web Content Accessibility Guidelines 2.0, provided by the W3C (link to requirements above).
- Site must be scalable for mobile technology.
- Common Theme – Each section of the site should have a common look and feel, branding elements (logos, colour palette, fonts) and will be provided by Imagine Canada’s graphic designer.
- Easy to Navigate – The site menu structure should follow a user-friendly format presented in a logical manner and require a limited number of “drill downs” for the user to find the desired information.
- User authentication – The site must connect with our user authentication system (currently in development on a SharePoint platform). Authenticated access will provide specified users privileged pages of content and services.
- Automated feed features – RSS feed capabilities to generate feeds from our content and display feeds from generators.
- Site search – Ability to search the site with key words or phrasing that will identify content throughout the site (including a pdf search).
- Tracking – User stats will be tracked through Google Analytics (see further specifications for database use tracking below).

Database requirements

The database back-end should provide Imagine Canada’s information management staff the ability to easily update the database and manage the information contained within it. The content of the database is currently in Inmagic DB/TextWorks (a proprietary software <http://www.inmagic.com/what-is-the-library-suite>) and it contains roughly 8000 records (see live database at <http://ic.andornot.com>). We welcome solutions that include the use of this software or alternatively offer a solution that allows an import from the existing database, meeting the below requirements.

Back-end requirements include:

- Back-end interfaces with Web output functionality.
- Ability to create additional databases at a later date if necessary AND build a search interface for those new databases. Ideally this could be accomplished by in house staff.
- Must support hierarchical, faceted classification taxonomy for multiple fields.
- Ability to create custom reports on specified field sets (e.g. Dead URL link-check function saved sets by date, collection type).
- Ability to attach electronic files to records directly (e.g. PDFs, PowerPoint presentations, text documents) and provide links to other web-based items (that we do not host).
- Generate an RSS feed of resources based on specified query logic models (e.g. all new items added since last update, all items published since 2011 and with X keyword).

- Connection to the database back-end should be internet browser-based, allowing updating access via the web. Changes can be made live by Imagine Canada staff.

Front-end requirements include:

- A user-friendly, transparent search function including:
 - Faceted search listing available developed from predetermined ‘attributes’ (title, author, keywords, etc.).
 - Free-text search field that searches ALL fields in a record; the facets would be used to refine this type of search.
 - Hyperlink attributes (clicking on an attribute from inside a record will display a list of all other records tagged with that particular attribute).
 - Search within pdfs that are linked as resources in the collection.
 - Should be simple for us to include full or limited searches on any of the site’s pages.
 - Free-search should correct for common spelling errors, and look for synonyms (e.g. “chairity” would look for charity, charities, philanthropy).
- Results report view should provide visuals indicating the format of document, options to select, add to a list, save for later, share and “order/borrow”.
- End-user can select items with check boxes to create a list. Email the list, save search history, and print list options.
- Ability to pull book images from Google or another online book seller.
- Potential to provide mail alerts to approved users in specific criteria categories (e.g. email of new items in “organizational leadership”).
- Items are easily shared with “Social” functions (e.g., Facebook, Twitter, etc.)
- Ability for staff to generate and provide links or feeds from canned searches.
- Identify format of resource with an icon (e.g., book, video, PowerPoint, etc.)

Use tracking and user management

- Tracking of user search strings, queries, free text search strings, facet selections.
- Tracking of downloads, complete and incomplete actions.
- User authentication - select users have the ability to login (via in house user authentication system) and have exclusive permitted options (e.g. ‘Request this book’, save your search history, Ask us a question, etc.)

Testing, Training and Sign-off

Testing – We expect testing of site in all applicable browsers and mobile devices to ensure website is both functional and user-friendly. We require that adequate response time to fixes is built in both pre- and post-launch. Please explain your proposed testing plan in the submitted proposal.

Training – We require the developer to provide detailed user training on CMS and database solutions to key staff members (small group). General training on the CMS will be delivered to

a larger group of staff members and further supported by a selected Imagine Canada staff person.

Delivery and Sign off – Prior to final sign-off, Imagine Canada requires delivery and uploading of site to an outside third party, or hosting by consultant (to be determined). Sign-off on Phase I will precede work on Phase II. Sign-off on Phase II will occur when all mutually agreed upon specifications and requirements are delivered. Once the website has been completed and accepted by Imagine Canada, the website design and all of its contents, software and architecture become Imagine Canada's property.

In-House Resources

Project Leadership – An assigned member of Imagine Canada's leadership team will be responsible for ultimate oversight and approvals regarding finances, contracts and organizational sign-off.

Project Management – An assigned project manager will be made available to present information and coordinate with Imagine Canada staff, including a reasonable number of meetings to present design and development solutions.

Information/Knowledge Management Team – Imagine Canada's information management team will work closely with developers on website information architecture, graphic look and feel, user navigation, home page and main navigation templates.

Graphic Design

We currently work with a sub-contracted graphic design group that is familiar with our brand style and identity. We will have a colour palette, logos and fonts to guide the design for the new site. A portion of the site development will involve re-branding activities where the "look" will be developed by our graphic design consultants. The implementation of these designs on the technology will be determined during planning and development.

Technology Profile

Imagine Canada currently runs various technology solutions for our various business activities; the following is a summary of our applications:

- Salesforce – Customer relations management system
- Drupal CMS –General website properties and online store
- Library catalogue – Inmagic DB text works (back-end), Web Publisher Pro (front-end)
- Wordpress.com – Imagine Canada blog and the Nonprofit Newswire
- SharePoint – CharityFocus, user authentication module

6. TIMELINE

- Proposals are due no later than 12:00pm/noon EST Friday March 16, 2012
- Proposers will please send one electronic copy attention: Toni Stockton tstockton@imaginecanada.ca and two printed copies for our review to
Attention: Toni Stockton
Imagine Canada
2 Carlton St. Suite 600
Toronto ON
M5B 1J3
- Proposals will be evaluated immediately thereafter.
- We expect to make a decision by April 20 2012.
- Selected vendors may be invited to attend an interview.
- We expect work to begin in mid-May 2012.
- We expect the site to go live in October 2012.

7. BUDGET

Please provide an estimated budget to accomplish the project as outlined. The budget must encompass all design, production, and software acquisitions necessary for development and maintenance of the website. Hosting and ongoing product licenses will be addressed separately and costs for hosting are not included in the budget for this project. List pricing for:

- Phase I: Discovery, Requirements Planning & Site Definition
- Phase II: Site Development, Testing and Deployment
- Ongoing maintenance of the CMS and structural features of the website: Discussions during the discovery phase and your input and advice will help us make a decision on ongoing maintenance.
- Hosting: We have not yet made a decision to host on or off-site. Discussions during the discovery phase and your input and advice will help us make a decision in this regard.

Imagine Canada has allocated \$50,000 - \$60,000 (Phase I and II – including license set up fees, please itemize costs). However, we will entertain responses for greater than \$60,000 if they show an incremental project plan. Hosting, ongoing licenses and maintenance costs will be addressed separately.

8. QUALIFICATIONS

- List two-three websites your firm has produced that best reflect your work and relevancy to this project.
- Describe your experience in producing sites for nonprofit and/or community-focused projects.
- Provide current reference information for two-three former or current clients.

- Briefly describe your firm's organizational capacity to produce our website (e.g. staff, equipment, software, physical space, office location, etc.).
- Briefly describe the team that would work on this project and your firm's project management process.
- Please discuss any major planned upcoming organizational changes that might affect the project.
- Please discuss any hardware/software vendor partnerships.
- Please discuss your testing and support process.
- Please explain the components of your general service level agreements (SLA).

9. CONTRACT TERMS

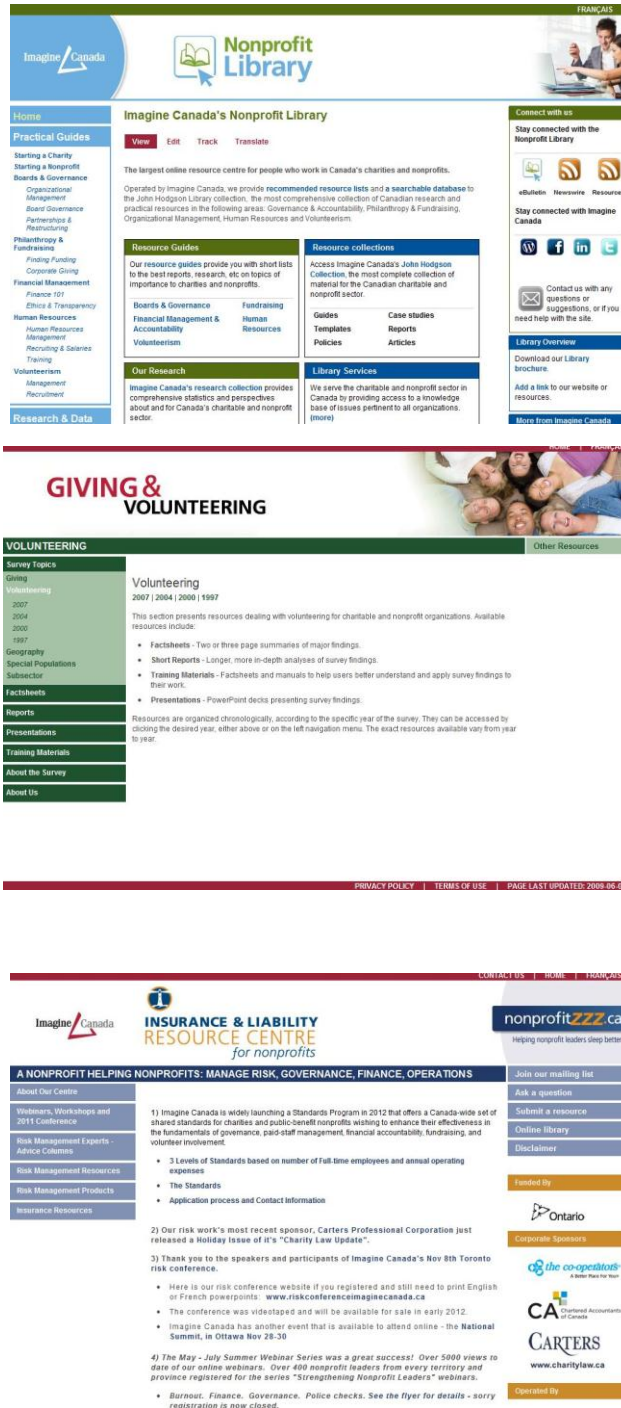
Imagine Canada will negotiate contract terms upon selection. Once the website has been completed and accepted by Imagine Canada, the website design and all of its contents, software and architecture become Imagine Canada's property.

If you have any questions or wish to discuss aspects of the RFP please initially contact:

Toni Stockton
tstockton@imaginecanada.ca
Library Information Services
416-597-2293 x255
Imagine Canada
2 Carlton St. Suite 600
Toronto ON
M5B 1J3

Appendix A

The following are screen captures of the existing web properties that we intend to redesign. See Appendix B for the new vision.



Appendix B

These mockups represent how we envision the website to look and offers a preliminary simple information architecture.

