

# Request For Proposal: User Experience Assessment & Member Portal Migration

## **Executive Summary**

Actors' Equity ("Equity"), the labor union representing American actors and stage managers in the theatre, is seeking a technology partner to assist with:

A) a user experience assessment of Equity's member portal

B) migration of the member portal from Equity's legacy platform onto a new SiteFinity CMS platform, including implementation of recommendations from the usability review and implementation of a comprehensive mobile-friendly design.

Vendors are welcome to apply for just element A or both elements A and B. Vendors who can deliver on both elements are preferred – either directly or through a partnership with another firm.

Responses are due October 13 with an award expected by mid-November. Project work will be expected to begin by December 14 and continue into 2022.

Successful completion of this project will position the vendor for additional technology work at Equity, including a planned re-implementation of Casting Call, the union's job posting and audition management system.

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## **About Actors' Equity**

Actors' Equity Association, founded in 1913, represents more than 51,000 professional Actors and Stage Managers nationwide. Equity seeks to foster the art of live theatre as an essential component of society and advances the careers of its members by negotiating wages, improving working conditions and providing a wide range of benefits, including health and pension plans. Actors' Equity is a member of the AFL-CIO and is affiliated with FIA, an international organization of performing arts unions.

### **Point of Contact**

Please direct all questions to Doug Beebe - rfp@actorsequity.org.

# **Background**

### **Project Context**

Equity members use the union's member portal to perform a variety of members-only features, including viewing their contracts, paying dues and reading members-only news. (See Desired Functionality and Appendix sections for details.) Note that the member portal is separate from Equity's public-facing site, actorsequity.org.

At a recent national convention, Equity members passed two resolutions asking union leadership to explore making the member portal easier to use and more mobile friendly. Members are seeking a site that makes it easier for occasional users to quickly find the information they are looking for.

#### **Technical Context**

The current member portal is built on a deprecated technology platform, <u>Adxstudio</u>. The technical direction is to migrate the site to a new content management system, <u>SiteFinity</u>. The organization's public-facing website, actorsequity.org, has been migrated to SiteFinity but hasn't launched yet.

Equity uses Microsoft Dynamics 365 CRM as its core backend datastore. Equity's infrastructure is hosted in Microsoft Azure.

See appendix for sample screenshots of the member portal.

#### **Staff Context**

Equity staff applicable to this project include the following employees (all full-time):

- IT director Project champion; decision maker on technical questions
- Senior software developer Responsible for code reviews and final code handoff
- Communications director Decision maker on communications questions
- Communications staff Responsible for receiving hand off of site updating procedures
- Product owner (to be hired) Responsible for member- and public-facing products; will establish future direction for the member portal

### **Desired Functionality**

#### **User Experience Assessment**

Equity is seeking a user experience assessment of its member portal that will identify common use cases for visiting the member portal and propose a re-organization of the member portal to make these use cases easier to find and complete.

The site's color scheme, fonts and overall layout were updated in 2017. Equity members have not recently voiced a specific desire to give the site a "new look," but these design elements can be considered to the extent they impact usability. For instance, Equity is open to revising the site's current reliance on dropdown menus for navigation.

Vendors can propose their own preferred user experience assessment methodology. If desired as part of the assessment, Google Analytics data from the existing member portal platform is available. Equity staff can also assist in identifying members for persona definition, interviews and user testing as desired. Vendors' proposals should include an estimate of the type and quantity of member time that will be required.

The assessment should address the following areas:

- Recommendations for revising site layout and content to make it easier for members to complete common tasks
- Recommendations for mobile layout adjustment to facilitate completing common tasks
- Recommendations for search configuration
- Recommendations for content tagging and identifying related content
- Recommendations for promoting accessibility

Note: Stakeholder interviews suggested that using a mobile website will be faster to build, easier to maintain and more comprehensive than a native mobile application, but the user experience assessment should flag if a mobile application would provide a significantly superior user experience for particular use cases.

#### **Portal Migration**

Following completion of the user experience assessment, Equity wants to migrate its existing Adxstudio based member portal to the new SiteFinity platform. This migration should incorporate the results of the user experience assessment.

Major pieces of functionality to migrate include:

- Pure content pages (~70 pages)
- Pages that require light CRM data (leverage <a href="CRM Portal Connector">CRM Portal Connector</a>) (~20 pages)
- Pages that require significant custom functionality (6 pages currently implemented in .NET code):
  - Credit card payments (integrate with Converge credit card provider)
  - ACH payments call custom (already built) Dynamics 365 methods
- Porting of document library (100-150 documents)
- Login Implement an independent login provider (e.g. Identity Server) linked to CRM contacts (Equity members), including:
  - Registration process
  - Configuration of SiteFinity to use login provider
  - o Configuration of existing Casting Call application ADX studio to use login provider

SiteFinity's Dynamics 365 CRM Portal Connector is the preferred method of accessing CRM content. The Dynamics SDK can also be used. As the organization's goal is to move to a SaaS version of Dynamics 365, direct database access should be avoided.

The site should support the latest versions of Chrome, Safari and mobile Safari browsers. The following Android and iOS devices should be specifically supported: iPhone 11, iPhone SE, Samsung Galaxy S9. The site should be accessibility-compliant.

#### **Decision Criteria**

Proposals will be evaluated on the following criteria.

Area	Criteria	Description	Sub-Criteria
Operations	Functionality	Offering's ability to deliver its required capabilities and meet Equity's unique needs	<ul> <li>Quality and thoroughness of user experience assessment approach and deliverables</li> <li>Quality and thoroughness of site migration approach and solution</li> </ul>

	Affordability	Offering's overall cost including acquisition and on-going maintenance	<ul> <li>User         experience         assessment         pricing</li> <li>Site migration         pricing</li> <li>Ongoing         support         pricing, if any</li> </ul>
Technology	Maintainability	Level of effort required to keep solution running while in production including problem resolution and ongoing support	<ul> <li>Quality and thoroughness of proposed testing procedures</li> <li>Knowledge transfer process</li> </ul>
Vendor	Prominence	Vendor's perception in the marketplace	<ul> <li>Vendor     Stability</li> <li>Maturity</li> <li>Market Share</li> </ul>
	Experience	Vendor's familiarity in delivering solutions to similar organizations and with similar topical focus	<ul> <li>User         experience         assessment         experience</li> <li>SiteFinity         experience</li> </ul>

		•	Azure experience Dynamics 365 experience Mobile web development experience General web development experience
Community	Vendor's alignment with Equity's culture	•	Diversity, Equity and Inclusion Focus Union Experience

# **Expected Budget Range**

Equity anticipates the cost range for this effort to be:

User Experience Assessment: \$50,000-\$125,000

Member Portal Migration: \$130,000-\$230,000

These cost ranges are provided to help illustrate the level of effort Equity is anticipating for this project, but they are not firm limits. Bids under the minimum range are encouraged and will be favorably considered assuming requirements are still met. Bids over the cost range are welcome, but vendors should be sure they are not going beyond the requirements. Please leverage the question and answer period to address any potential misunderstandings.

Vendors are welcome to propose any price structure for their bids, but the preferred cost structure is as follows:

- A) User Experience Assessment Fixed price
- B) Member Portal Migration Cost Range

The selected vendor will have an opportunity to refine the cost range for the member portal migration at the conclusion of the user experience assessment to account for the results of the assessment.

### **Vendor Information**

Please include the following information in your proposal:

- Summary
- History
- Differentiators
- Portfolio
  - User experience assessment work
  - Content management system work, ideally with SiteFinity
- Awards (optional)
- HR & Hiring Practices
  - Equity is aiming to select one or more finalist vendors that demonstrate one or more of the following:
    - Effective diversity hiring practices
    - Ownership by a member of a marginalized group
    - Unionized workforce
  - Will your project team include resources based outside of the United States? If so, where?
- User Experience methodology and deliverables
  - o Proposed team size and roles
- Member portal migration methodology
  - Proposed team size and roles
  - Communications plan for staff
  - o Code review and hand off process with Equity's senior developer
  - Quality assurance and user-acceptance testing processes
- Pricing

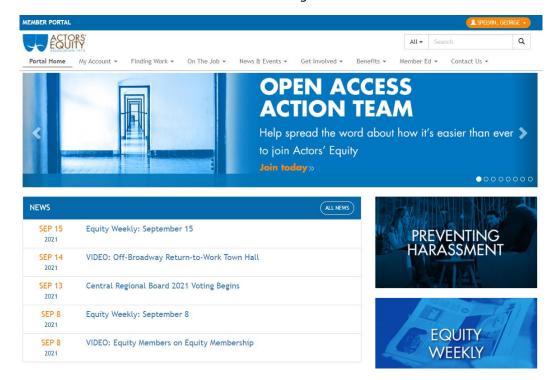
## Submission timeline and procedures

- Questions deadline: 9/30
  - Please email questions to rfp@actorsequity.org
- Question responses issued: 10/4
- RFP Response deadline: 10/13
  - Final submissions should be in the form of a PDF emailed to rfp@actorsequity.org
- Virtual presentations from finalists: 10/18-10/22
- Recommended vendor selection to be completed by 10/29

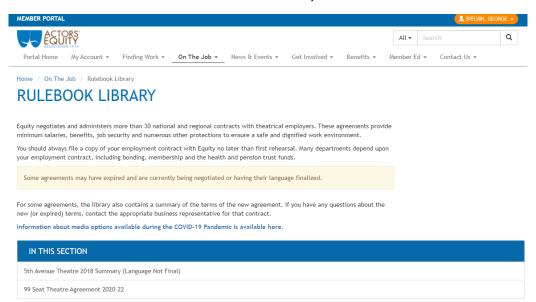
Note: The selected proposal will be submitted to Equity's governing council on or before 11/16. If approved, vendors will be asked to begin work on or before 12/14. If you anticipate an issue with this starting timeframe, please indicate a preferred starting timeframe in your response.

# **Appendix: Member Portal Screenshots**

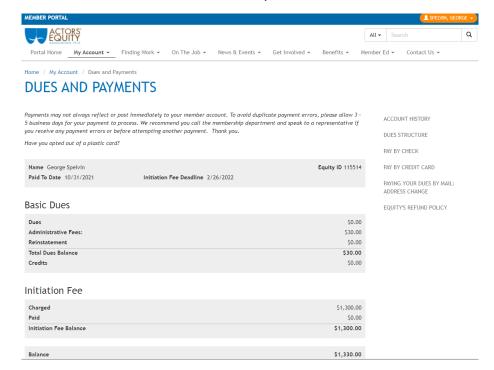
#### Home Page



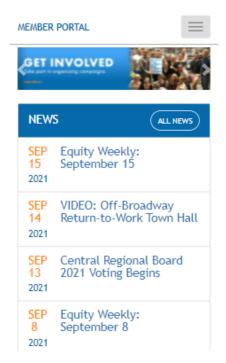
### Rulebook Library



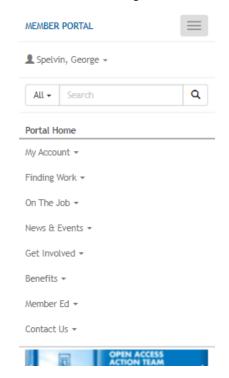
#### **Dues and Payments**



#### Mobile Home



### **Mobile Navigation**



# **Appendix: Migration Task List**

Below is a list of tasks Equity has identified to migrate existing member portal content to the new platform. Note that design and content structure changes identified during the user experience assessment may change the tasks shown here or add new ones.

Title Create Custom Council Directory List Create Find Your Business Rep Page Create Liaison Detail Pages Create Deputy Support Center Pages Create an Announcement Module in CMS to manage Carousel	Dependencies CRM Portal Connector CRM Portal Connector CRM Portal Connector
Create Credit Card Success Page	Custom Code (CC Provider integration) Custom Code (CC Provider
Create Credit Card Error Page	integration)
Create a custom widget for News List Items.	
Create a custom widget for Event List items.	
Create a custom widgets for Home Page Info Tiles.	
Create a carousel widget for the Portal Home Page.	
Build a TPC List to return Agency information from CRM.	CRM Portal Connector
Create Pay by Check Page	Custom Code (CRM endpoint) Custom Code (CC Provider
Create Pay by Credit Card Page	integration)
Create Portal Home Page	
Create Password Reset Page	External login provider
Create My Account Page	CRM Portal Connector
Create Profile Update Page	CRM Portal Connector
Create Self-ID Page	CRM Portal Connector
Create Preferences and Subscription Page	CRM Portal Connector
Create Member Assistance Page	CRM Portal Connector
Create ACH Success Page	Custom Code (CRM endpoint)
Create How To Hire Me Page	
Create Login Page	External login provider
Create Terms and Conditions Page	
Create Privacy Page	
Create Dues and Payments Page	CRM Portal Connector
Create Status Change Page	
Create Account History Page	CRM Portal Connector
Create Dues Structure Page	
Create Pay Dues by Mail Page	
Create Dues Flexibility Page	
Create Name Change Page	

Create TW-SP Page

Create Financial Core Page

Create On the Job Page

Create Codes Library Page

Create Guidelines for Dance Captains Page

Create Rulebook Library Page

Create SM Docs Page

Create Understanding Harassment Page

Create Safety Hotline Page

Create Workers Comp Page

Create Injury/Illness Page

Create Work-sustained Accidents Page

Create Working in LA Page

Create Membership Companies Page

Create 99-Seat Productions Page

Create News and Events Page

Create Equity News Center Page

Create Equity 2020 Page

Create Exec Dir Page

Create President Page

Create News and Events Page

Create Tax Tips Page

Create Events Page

Create Events Detail Page

Create Get Involved Page

Create Campaigns Page

Create Governance Page

Create Council Directory Page

Create Code of Conduct Preface Page

Create Benefits Page

Create Discounts Page

Create VITA Page

Create Pension, Health, 401k Page

**Create Social Services Page** 

Create Credit Union Page

Create Member Ed Page

Create New Members Page

Create New Member Finding Work Page

Create New Member Solidarity Page

Create Contracts and Codes Page

Create Coronavirus Resource Page

Create Contact Us Page

Create Sitemap Page

Hookup document library

**CRM Portal Connector** 

Create Finding Work Page

Create Theatre Directory Page CRM Portal Connector
Create Agency Directory Page CRM Portal Connector
Create Liaison Home Page CRM Portal Connector

Create Rulebook Library in CMS Create Exec Dir Blog in CMS Create President Blog in CMS

Create Tax Blog in CMS

Create Registration Page External login provider

Setup standalone login provider

Configure SiteFinity to use login provider Configure Casting Call to use login provider

Site layout updates + mobile friendly

Search adjustments

Digital Membership Card Custom Code

Open Access Action Team

Election 2021 Page

Non-Council CRB Directory Page CRM Portal Connector

Committee Chairs/Vice Chairs Page
Observing an Equity Meeting Page

Convention 2021

Delegates Page CRM Portal Connector

Convention FAQ

How to Connect to a Zoom Meeting

Governance Calendar CRM Portal Connector