Website Redesign Services

Request for Proposal

June 2024

***Ref 06-20-24**

REQUEST FOR PROPOSAL-
Notice to Prospective Consultants

June 20th, 2024

You are invited to review and respond to this Request for Proposal (RFP), providing services related to the development and implementation of *Website Redesign Services for the Community Business Development Corporations of Atlantic Canada.* In submitting your proposal, you must comply with these instructions.

Please note that no verbal information given will be binding unless such information is issued in writing as an official addendum.

In the opinion of the Atlantic Association of Community Business Development Corporations, this RFP is complete and without the need for explanation. However, if you have questions, or should you need any clarifying information, the contact person for this RFP is:

<div align="center">

Helen Michel
(Atlantic Association of Community Business Development Corporations)
902-747-2232 (Office)
helen.michel@cbdc.ca

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Please note we require all responses to this RFP to be based on fixed-priced quotes, no estimated quotes will be considered.

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1.0   Introduction

The Atlantic Association of Community Business Development Corporations (AACBDC) invites interested firm(s)/consultant(s) to respond to this Request for Proposal (RFP) to conduct **Website Redesign Services** for the Community Business Development Corporations (CBDC) website www.cbdc.ca.

2.0   Contracting Agency

For this contract, the AACBDC will be the contracting agency.

The AACBDC is engaged in community-based business development through a network of autonomous, not-for-profit organizations that work with all levels of government and the private sector to meet the needs of small and medium enterprises.

In Atlantic Canada, there are 41 corporations dedicated to assisting small and medium enterprises including start-up, expansion, modernization, and maintenance of business entities in all sectors of the economy.

The AACBDC administers, on behalf of its 41 member CBDCs, several programs and initiatives. AACBDC is governed by a volunteer Board of Directors that is selected by each of the Atlantic provinces to provide oversight and governance of the affairs of the organization.

3.0   Background

The Atlantic Association of CBDCs carries out Atlantic-wide marketing initiatives through the Atlantic Communications Committee. The committee, which began in 1997, has representation from each of the four Atlantic Provinces, ACOA, and staff from the Atlantic Association of CBDCs and is responsible for developing and executing a marketing strategy annually. The marketing strategies include items such as an annual report, coordinated ad campaign, management of social media, and responsibility for the ongoing maintenance and enhancements to the website www.cbdc.ca.

Last year, as part of the 2023 Annual General Meeting and Conference, a decision was made to stick with the CBDC brand, but an audit of the brand would be performed and make recommendations on how to improve and modernize it.

3.1   Engagement Oversight

The AACBDC has appointed Helen Michel to liaise with the consultant for ongoing information and project management requirements. For the length of this engagement, the consultant will report to Helen Michel on the project deliverables and objectives.

Additional oversight may be provided by the Atlantic Communications Committee, which is comprised of:

- One representative from each of the four Atlantic provinces.
- Two ex-Officio representatives from the Atlantic Canada Opportunities Agency (ACOA).
- One representative from the AACBDC.

4.0 Project Objectives

The Atlantic Association of CBDCs is seeking proposals from qualified consultants to provide professional services related to the development and implementation of a new website for the Community Business Development Corporation (CBDC) www.cbdc.ca.

The selected consultant will work closely with the AACBDC staff to achieve the following objectives:

- **Consultation:** Meetings with AACBDC staff and the Atlantic Communications Committee to review the project objectives and milestones. A copy of the *Website Survey and Audit* that was conducted earlier this year will be shared with the consultant. A two-page summary of the key findings is attached to this document for your reference.

- **Design:** The service provider will design a website that:
  - The website needs to serve and represent all 41 CBDCs and 4 Associations providing URL links to their individual site pages which CBDCs can use to promote their local programs and services.
  - The new CBDC website is designed to significantly enhance the user experience with a client-focused approach. The site aims to provide seamless access to critical information, such as details on programs and services, and contact information, with minimal navigation required. This streamlined design ensures that clients can find the information they need efficiently and effortlessly, reflecting our commitment to user-centric service. Can toggle between English and French.
  - Is visually appealing and follows the CBDC visual identity standards.
  - The website should be designed allowing for future modification to design elements such as logo, colour palette, and font.
  - Is optimized for mobile.
  - Is secured and protected against cyber-attacks using the latest technology and best practices.
  - Has a user-friendly content management system that provides access for CBDC staff to add content to the site and complete updates.
  - Can be linked to Google Analytics and Microsoft Clarity for data reporting and monitoring.
  - Can accept inquiries through a customized contact card.

- Is compliant with Mac and PC, as well as with the latest two versions of Microsoft Edge, Mozilla Firefox, Chrome, and Safari.
- Meets the Canadian federal government guidelines around web accessibility.
- Adheres to all Canadian privacy and data regulations. Any data collected from the application and website must follow the SOC2 Privacy Principal Guidelines.
- The Consultant should demonstrate in their proposal how their selection of design tools and/or applications is in line with leading practice.
- Supports ~200,000 annual site visitors.

- **Development:** During the development of the website the service provider must:
  - Provide biweekly touchpoints throughout the project with the project lead of the AACBDC.
  - Coordinates with internal CBDC MIS/IT personnel and CBDC IT contractor to ensure the site complies with CBDC cybersecurity standards.

- **Testing:** To ensure the site is ready for use by CBDC, the service provider must provide:
  - Demonstration of working prototypes of the website.
  - Training of the Atlantic Association of CBDCs staff on how to manage the website and upload and edit content. This includes the development of reusable training assets such as a training guide or recorded webinar (the format(s) are to be described in the response to the RFP).

- **Launch:** To smoothly launch the site, the service provider shall:
  - Identify and provide an initial training/introductory training video on-site navigation.
  - Provide dedicated 2-hour response tech support during the first week of launch (Mon-Fri, 08:30-16:30 Atlantic time).
  - Provide dedicated 12-hour response tech support during the first month of launch (Mon-Fri, 08:30-16:30 Atlantic time).

- **Ongoing Maintenance:** The service provider will outline their rates and turnaround times to provide ongoing maintenance, including:
  - Hosting the site, or subcontract hosting requirements to a web hosting company approved by the Atlantic Association of CBDCs.
  - Ongoing maintenance and management.
  - Ongoing technical support for any identified issues.
  - Ensuring the site is available for 99% of business hours, excluding upgrade windows agreed upon with the Atlantic Association.
  - Ensuring the upgrade processes do not result in any business hour downtime – all planned upgrades are to occur on weekends or holidays.

5.0 Scope of Work

The scope of work for the consultant shall include, but not be limited to, the following:

- **Initial Assessment:**
  - Conduct a kick-off meeting with the Atlantic Communications Committee to understand the goals, target audiences, and unique selling points.
  - Review existing program materials, website, and relevant documentation to gain insights into the features and functionality to incorporate into the design and development of the new website.
  - Review the findings of the *CBDC Website Survey and Audit* to ensure that they are incorporated into the new website design.
- **CBDC Design, Development, Testing and Training:**
  - Design the new website keeping in mind the following key pillars:
    - Simplified navigation and user-friendliness.
    - Enhanced user experience (UX) for navigation.
    - Enhance program accessibility.
    - Modern website design.
    - Update content and program information.
  - Ensure the site is thoroughly tested before launch.
  - Ensure staff of the CBDC are trained on the new features and functions of the website before launch.
- **Website Launch:**
  - The new website is launched, replacing the existing website before it is no longer supported (December 2024).

6.0 Deliverables and Milestones

The following chart provides a breakdown of the key project milestones throughout the engagement.

Project Kick-Off and Discovery	July 2024
Engagement of Consultant	July 2024

CBDC Design, Development, and Implementation	August 2024 - December 2024
Initial Assessment	August 2024
Development of Website Wireframes	September 2024
Development of the New Website	September – November 2024
Website Launch	December 2024
Training	December 2024

7.0   Proposal Structure

Table 1: Response Structure	
Introduction	This section should briefly describe the firm, its capabilities, and its experience in handling an assignment of this nature.
Understanding the issue	This section should explain the Consultant's understanding and interpretation of the objectives and requirements of this project. The successful Consultant will have demonstrated a good understanding of the work to be undertaken.
Work plan and methodology	This section should include the consultant's work plan, methodology, and understanding of the objectives and tasks outlined in section 4.0.
Summary of qualifications and experience	This section must include: • A brief résumé of the qualifications and experience of the consulting firm as they relate to this RFP. • A list of key project personnel to be used in the project outlining their roles and responsibilities. • (If applicable) a list of any subcontractors (individual or organization) that the Consultant intends to use when providing services under this RFP. • Corporate profiles and short-form résumés of key project personnel, as well as references for related work to be included as an appendix. Provide two reference projects where the company has undertaken work of similar scope and scale.
Pricing	Pricing is to be detailed in a table and should include: • All professional fees • Travel costs (if applicable) for face-to-face meetings. • Other costs

8.0   Project Schedule

The project schedule should assume an approximate starting date of July 15th, 2024. The term of the contract is anticipated to be up to and including December 31st, 2024.

9.0 Submission of Proposal and Vendor Information

Proposals must be received by the AACBDC contact no later than 4:00 pm on July 2nd, 2024.

- Proposals should not exceed twenty (20) pages, excluding appendices. Appendices are acceptable as outlined previously.
- The successful proponent will be contacted within 14 business days of the RFP closing.
- Please submit an electronic version of the proposal in Word and Adobe Portable Document Format (PDF) to the following email address: helen.michel@cbdc.ca.

10.0 Proposal Evaluation

The AACBDC will evaluate the proposals. The lowest-priced proposal may not necessarily be accepted. The AACBDC reserves the right to recommend rejection of all proposals and either cancel or re-issue the RFP if necessary.

The qualifications, commitment, related experience, and knowledge of the project personnel will be key evaluation factors. The experience of the consulting team in undertaking assignments of this nature and magnitude will be a significant factor in proposal selection. The evaluation framework outlined in Table 2 will be used in the selection with special attention given to the methodology, the project management, and the delivery plan.

The Evaluation criteria used to evaluate proposals fall into the following categories as referenced in Section 7:

Table 2: Selection Criteria		
	Factor	**Scoring**
1.	Consultant experience demonstrates the ability to provide requested services	15
2.	Consultant demonstrates an understanding of the project, its objectives, and metrics for evaluation	20
3.	Completeness and suitability of approach (proposed methodology)	15
4.	Capacity (identification of resources to undertake the project as well as relevant skills and experience by the individual)	15
5.	Pricing	25
6.	The consultant is from Atlantic Canada	10
	Total	**100**

Please note: we may choose to interview a shortlist of consultants as part of the evaluation process.

11.0   Language of Proposal Submission

Language of Proposal Submission Respondents are encouraged to submit their proposals in either French or English, based on their preference. Both languages are accepted for the submission of proposals. The evaluation process will ensure equal consideration and understanding of proposals regardless of the language chosen for submission.

12.0   Awarding of Contract

The resulting contract will contain such reasonable terms as the AACBDC may require.

The awarding of the contract will be made by the AACBDC, based upon the results of the evaluation of submitted proposals. The AACBDC will notify the successful Consultant in writing via electronic means. Those who are not successful will receive a written notification via electronic correspondence as soon as possible once the award of the contract has been accepted and the negotiations have been concluded with the successful Consultant.

13.0 Contact

All inquiries and requests for clarification must be submitted via email. Requests for clarification should be directed to helen.michel@cbdc.ca.

The AACBDC will administer the contract for this project. Contact for this RFP is:

Name: Helen Michel
Organization: Atlantic Association of CBDCs
Address: 459 Murray Street, Mulgrave, NS B0E 2G0
Email: helen.michel@cbdc.ca
Telephone: (902) 747-2232 Ext 205

14.0   General Conditions

Verbal information or representations shall not be binding on the AACBDC. Only changes, alterations, modifications, or clarifications approved in writing will be binding. To be valid all such changes, alterations, modifications, or clarifications shall be issued in the form of addenda and all such addenda shall become a part of this RFP.

The proposal of the successful Consultant will form part of any resultant contract agreement by attachment and incorporation by reference. Claims made in the proposal will constitute contractual commitments. Any provision in the proposal may be included in the resultant

contract as a direct provision thereof. The successful Consultant, as a condition of submitting its proposal, accepts a customized contract that will be negotiated.

Any resultant contract from this RFP will be governed by the laws of Nova Scotia and shall be issued in the name of the successful Consultant exactly as that successful Consultant's personal or corporate name is stated in the RFP response document. Funds payable for materials delivered under any resultant contract shall be paid only to the Consultant who is so listed as a party to any resultant contract. Only legally registered names of Proponents are acceptable.

The proposal will contain the signature, name, and title of the person authorized to sign on behalf of the Consultant on the proposal submitted in response to this RFP.

The responsibility rests with the Consultant to submit a complete proposal, with proper and adequate detail to substantiate all aspects of its proposal. Incomplete proposals shall be deemed to be non-compliant. A complete proposal should include but not be limited to:

- Legal name and status: The proposal shall state the correct legal name and legal status of the proposing entity and the correct mailing address.
- Consultant contact: The name, title, telephone and fax numbers, e-mail address and civic address of a representative who may be contacted for clarification or other matters relating to the proposal shall be provided.
- Content: The proposal will be clear, and concise, and must include sufficient detail for effective evaluation and for substantiating the validity of stated claims. The proposal shall not simply rephrase or restate the requirements but rather shall provide a convincing rationale to demonstrate how the Consultant intends to meet these requirements.

The successful Consultant must be licensed to conduct business in its jurisdiction and may be required to produce a certificate of good standing for that jurisdiction.

All terms and conditions will apply to all subcontractors and the Consultant will be responsible for subcontractors' compliance. The Consultant will be responsible for all work done by the subcontractors. The Consultant will be responsible for all damages and will complete any work unfinished by the subcontractors.

The following constitutes the release of payment by the AACBDC for this engagement:

1. 10% released upon signing of the contract.
2. 40% released upon presentation and signoff of completed website draft.
3. 50% released upon successful completion of the project.

15.0   Intellectual Property and Disclosure

All proposals and any intellectual property that is developed as a result of this project, including all data, specifications, concept plans, designs, rationales, presentation materials, economic and technical reports, and related information produced by the Consultant in completing this work

submitted shall become the property of the AACBDC. By submitting a proposal, the Consultant hereby grants the AACBDC a license to distribute, copy, print, or translate the proposal for the invitation and completion of the project, including to the members and representatives of ACOA.

All documents submitted by partner agencies shall remain the property of the issuing organization. All information is proprietary and as such shall be treated as confidential. Information obtained by the Consultant as a result of participation in this project is confidential and must not be disclosed without written authorization.

16.0   Website Analysis

The online survey was distributed to Community Business Development Corporation staff, volunteer board members, committee members, and clients between February 21st to March 09th, 2024.

Although there were numerous positive remarks, it was apparent that website visitors would see value in a refreshed website that would better meet the needs of users from all audience groups. Key messages from the feedback include:

- Simplify navigation and user-friendliness
    - More intuitive, with a focus on user-friendly design with clear paths to information, and in both official languages French and English.
    - Clarify the distinction between the CBDC network as a whole and individual branch pages.
- Enhanced user experience (UX) for navigation
    - Improve the overall user experience with better navigation, user interfaces, and a design that guides clients through the website more effectively.
- Enhance program accessibility
    - Organize programs by location, provide clearer explanations, and make it easier to access business plans and program applications.
- Modernize website design
    - Modernize the website's look, tone, layout, and graphics to make it more visually appealing and user-friendly.
    - General styling and look of the website to be more modern and visually engaging.
- Update content and program information
    - News updated weekly, resources are grouped by topic, and all information is current and detailed for individual CBDCs.
    - Keep program information up to date.

Audit Summary

The website audit was conducted using a mix of manual and automated methods. As was indicated in the survey, a first impression of the website may be a positive one when landing on the homepage. However, the in-depth audit revealed numerous issues that could result in a negative user experience from various aspects of the website. This is not unique to the CBDC website and many websites that have evolved and iterated over a wide number of years can face similar challenges.

Key issues identified for the front-end user interface are as follows:

- The website navigation and menu structure need to be improved; this includes the side bar menus throughout the website.
- Many pages are not mobile friendly and do not have a responsive design.
- The content experience can be confusing and inconsistent and varies depending on how a user arrives at a given page.
- Many content documents are old or outdated which could be a cause of frustration. This can also harm the credibility of the CBDC as providers of this content.
- The branch selector tool and use of cookies to set a users' preferred branch is confusing and does not provide an expected or typical experience for this kind of feature.
- Various accessibility issues exist on the website and the UserWay widget is being used to work around issues and should not be considered a solution.

The Drupal back-end of the website is a major contributing factor to the issues faced by users on the front-end. Managing multiple branches, with unique content for each, from a single set of page structures is problematic. The configuration makes it challenging for both administrators and branch content contributors. It is currently extremely difficult to manage content or create a useful inventory from the CMS.

Recommendations

As part of a website refresh, the following should be considered as priorities:

- A comprehensive review and update of website content (this applies to all page content and documents).
- Determine in French and English content should have a 1-2-1 ratio or partial translation.
- Create a structured user experience for the website that:
    - Has a more intuitive menu and wayfinding system. ○ Allows users to easily navigate between CBDC general content and that of individual branches.
    - Provides users with updated features for searching and filtering content and resources applicable to their needs (e.g. a filter for resources should allow 'Show all', 'Filter by province', 'Filter by branch', 'Filter by category').
    - Follows best current practices for design, mobile responsiveness, accessibility, privacy, and performance.
- Employ a content management system (CMS) that allows for structured content on the front-end and is easy to use for administrators. This would include:
    - The ability to manage the general CBDC and each branches content individually with appropriate permissions and privileges for content managers.
    - A multi-site CMS is highly recommended (many suitable platforms offer this functionality).
    - By using a multi-site, it is possible to set up the visitor facing site to operate on a per-branch location basis, such as a subdomain:
        - digby-clare.cbdc.ca
        - yarmouth.cbdc.ca
        - annapolis.cbdc.ca

Or page grouping:

- cbdc.ca/digby-clare/ ○ cbdc.ca/yarmouth/
- cbdc.ca/annapolis/

This separation would also allow user analytics tracking to be reported per location. As well as allowing links to be shared between visitors and ensure they're seeing the same content regardless of their own preferred/selected CBDC.

If a solution such as this is pursued, it will create a solid foundation from which the CBDC team can manage content and it will provide a more gratifying experience for all website visitors. It may also encourage individual CBDCs to invest in managing their own content and limit the requirement for their own stand-alone websites.

Next Steps:

Once the survey and audit report contents have been digested and fully understood, the recommended next steps in progressing the project would be:

- CBDC team to determine the desired approach and scale of the project. E.g. will one RFP be issued that will cover Website Strategy and Design, Content Review and Creation/Editing, Website Development, Ongoing Support and Hosting?