



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, [Adxstudio](#). The technical direction is to migrate the site to a new content management system, [SiteFinity](#). 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 [CRM Portal Connector](#)) (~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
 - 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 style="list-style-type: none"> • Quality and thoroughness of user experience assessment approach and deliverables • Quality and thoroughness of site migration approach and solution

	Affordability	Offering's overall cost including acquisition and on-going maintenance	<ul style="list-style-type: none"> • User experience assessment pricing • Site migration pricing • Ongoing support pricing, if any
Technology	Maintainability	Level of effort required to keep solution running while in production including problem resolution and ongoing support	<ul style="list-style-type: none"> • Quality and thoroughness of proposed testing procedures • Knowledge transfer process
Vendor	Prominence	Vendor's perception in the marketplace	<ul style="list-style-type: none"> • Vendor Stability • Maturity • Market Share
	Experience	Vendor's familiarity in delivering solutions to similar organizations and with similar topical focus	<ul style="list-style-type: none"> • User experience assessment experience • SiteFinity experience

			<ul style="list-style-type: none"> • Azure experience • Dynamics 365 experience • Mobile web development experience • General web development experience
	Community	Vendor’s alignment with Equity’s culture	<ul style="list-style-type: none"> • 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
 - Proposed team size and roles
- Member portal migration methodology
 - Proposed team size and roles
 - Communications plan for staff
 - 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

The screenshot shows the top navigation bar with 'MEMBER PORTAL' on the left and a user profile 'SPELVIN, GEORGE' on the right. Below the navigation is the Actors' Equity logo and a search bar. The main navigation menu includes: Portal Home, My Account, Finding Work, On The Job, News & Events, Get Involved, Benefits, Member Ed, and Contact Us. The hero banner features a blue background with a hallway image and the text 'OPEN ACCESS ACTION TEAM' in large white letters. Below this, it says 'Help spread the word about how it's easier than ever to join Actors' Equity' and 'Join today >>'. To the right of the banner are two video thumbnails: 'PREVENTING HARASSMENT' and 'EQUITY WEEKLY'. Below the banner is a 'NEWS' section with a list of articles and an 'ALL NEWS' button.

DATE	TITLE
SEP 15 2021	Equity Weekly: September 15
SEP 14 2021	VIDEO: Off-Broadway Return-to-Work Town Hall
SEP 13 2021	Central Regional Board 2021 Voting Begins
SEP 8 2021	Equity Weekly: September 8
SEP 8 2021	VIDEO: Equity Members on Equity Membership

Rulebook Library

The screenshot shows the 'Rulebook Library' page. The navigation bar is the same as the home page, but the 'On The Job' menu item is highlighted. The breadcrumb trail reads 'Home / On The Job / Rulebook Library'. The main heading is 'RULEBOOK LIBRARY'. The text explains that Equity negotiates and administers more than 30 national and regional contracts with theatrical employers, providing minimum salaries, benefits, job security, and other protections. It also states that members should always file a copy of their employment contract with Equity no later than first rehearsal. A yellow callout box notes that some agreements may have expired and are currently being negotiated or having their language finalized. Further text mentions that the library also contains a summary of the terms of the new agreement and provides information about media options available during the COVID-19 Pandemic. At the bottom, there is a section titled 'IN THIS SECTION' with a list of documents.

IN THIS SECTION

5th Avenue Theatre 2018 Summary (Language Not Final)
99 Seat Theatre Agreement 2020-22

Dues and Payments

MEMBER PORTAL SPELVIN, GEORGE

ACTORS' EQUITY ASSOCIATION 1913

Portal Home **My Account** Finding Work On The Job News & Events Get Involved Benefits Member Ed Contact Us

Home / My Account / Dues and Payments

DUES AND PAYMENTS

Payments may not always reflect or post immediately to your member account. To avoid duplicate payment errors, please allow 3 - 5 business days for your payment to process. We recommend you call the membership department and speak to a representative if you receive any payment errors or before attempting another payment. Thank you.

Have you opted out of a plastic card?

Name	George Spelvin	Equity ID	115514
Paid To Date	10/31/2021	Initiation Fee Deadline	2/26/2022

Basic Dues

Dues	\$0.00
Administrative Fees:	\$30.00
Reinstatement	\$0.00
Total Dues Balance	\$30.00
Credits	\$0.00

Initiation Fee

Charged	\$1,300.00
Paid	\$0.00
Initiation Fee Balance	\$1,300.00

Balance	\$1,330.00
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- ACCOUNT HISTORY
- DUES STRUCTURE
- PAY BY CHECK
- PAY BY CREDIT CARD
- PAYING YOUR DUES BY MAIL:
- ADDRESS CHANGE
- EQUITY'S REFUND POLICY

Mobile Home

MEMBER PORTAL

GET INVOLVED
Take part in organizing campaigns.

NEWS ALL NEWS

- SEP 15 2021 **Equity Weekly: September 15**
- SEP 14 2021 **VIDEO: Off-Broadway Return-to-Work Town Hall**
- SEP 13 2021 **Central Regional Board 2021 Voting Begins**
- SEP 8 2021 **Equity Weekly: September 8**

Mobile Navigation

MEMBER PORTAL

Spelvin, George

All Search

Portal Home

- My Account
- Finding Work
- On The Job
- News & Events
- Get Involved
- Benefits
- Member Ed
- Contact Us

OPEN ACCESS ACTION TEAM

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	Dependencies
Create Custom Council Directory List	CRM Portal Connector
Create Find Your Business Rep Page	CRM Portal Connector
Create Liaison Detail Pages	CRM Portal Connector
Create Deputy Support Center Pages	
Create an Announcement Module in CMS to manage Carousel	
Create Credit Card Success Page	Custom Code (CC Provider integration)
Create Credit Card Error Page	Custom Code (CC Provider 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)
Create Pay by Credit Card Page	Custom Code (CC Provider 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