



Canadian Museum of Immigration at Pier 21
Musée canadien de l'immigration du Quai 21

Request for Proposals Content Management System

Date of Solicitation: October 27, 2023
Closing: December 7, 2023 at 3 pm AST

The Canadian Museum of Immigration at Pier 21 is committed to purchasing goods and services to ensure the best overall value. Procurement is conducted with due regard to applicable laws, regulations, trade agreements, internal policies, environmental considerations and competitive processes. Ensure that you have read all procurement documents carefully and that your response includes all of the information requested. For additional information:

<https://canadabuys.canada.ca/en/how-procurement-works/policies-and-guidelines>

Canada

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1. Statement of Work

1.1 Project Summary

The Canadian Museum of Immigration at Pier 21 (CMI) is seeking a Content Management System (CMS) solution to manage and deliver digital signage content and interactive digital content (for public touchscreen kiosks and personal mobile devices) in our public spaces.

The purpose of this Request for Proposals (RFP) is to find a vendor that can provide a robust and user-friendly enterprise CMS system that meets our current and projected future requirements. As part of the Scope of Work, the vendor will manage the full process from requirements gathering, template design, CMS configuration and customization, content migration, testing, training, deployment and ongoing support and maintenance. Project deployment will be complete by January 31, 2025. Full integration of the software will be complete by March 31, 2025. Licensing to begin April 1, 2025.

1.2 Background

CMI collects, shares and pays tribute to the Canadian immigration story. CMI is situated on the Halifax waterfront at Pier 21, the National Historic Site that served as the gateway to Canada for nearly one million immigrants between 1928 and 1971. Today, this former immigration shed is home to Atlantic Canada's only national museum.

CMI was established under The Museums Act and began operating as a Crown Corporation in February 2011. CMI falls under Part X of the Financial Administration Act (FAA), which establishes the control and accountability regime for Crown corporations. It is also subject to a range of other statutes governing employment and superannuation, access to information and privacy, and Official Languages, among others.

CMI's collection constitutes an invaluable cultural resource to help Canadians learn about and engage with the nation's immigration history. The oral histories, digital images, written story accounts, archival materials and artifacts that comprise the collection promote an understanding of the breadth of experiences of immigrants to Canada, and their role in the evolution of the country's culture, economy and way of life.

1.3 Project Goals

1.3.1 CMI is seeking to acquire a CMS which can support the features and functionality of our current touchscreen interactives, plus the new interactives and digital signage outlined in this RFP. CMI's priority goals in moving to a new CMS for on-site digital content delivery are as follows:

- a) To make the museum's content more accessible to all visitors, including those with disabilities.
- b) To simplify and streamline content management process, both for current needs and in adding future experiences.
- c) To improve the collection of, and staff access to, data and analytics about visitor engagement with exhibits, to allow CMI staff to continually iterate and improve our visitor experience and content delivery.

- 1.3.2 The vendor shall provide services to incorporate best practices in:
- a) Bilingualism: as a Crown Corporation, CMI is obligated under the Official Languages Act to run campaigns in both English and French. CMI will manage and provide all translation services for all copy used. Please note, the working language of CMI is English.
 - b) Accessibility: CMI pursues an accessible environment as defined in the [Accessible Canada Act](#)). Our Museum is for everyone. We are respectful and welcoming. We focus on including people. We build accessible spaces. We work to meet the needs of persons with disabilities. We strive for: a barrier-free workplace; a safe and accessible site; easy-to-use websites; accessible exhibitions, programs and services.
 - c) Diversity, Equity and Inclusion: CMI pursues an environment that is respectful of the lived experiences of others, that considers diverse perspectives, and that fosters meaningful relationships within the community. CMI values diversity, equity, justice, and inclusion.
 - d) Collaboration: The Contractor shall actively engage in collaborative efforts with CMI. Regular communication, open sharing of ideas, and a proactive approach to problem-solving are essential components of the Contractor's role. The Contractor shall actively seek input, share data, and coordinate efforts to ensure the campaign's alignment with overarching marketing strategies.

1.4 Current Environment

CMI is a tenant of the Halifax Port Authority. CMI's public areas include two permanent exhibitions (Pier 21 Exhibition and the Canadian Immigration Hall), a small theatre, a classroom, gift shop, and meeting and event spaces across two floors and approximately 80,000 sq. ft. Throughout the Museum there are over forty touchscreens using ten different exhibit templates.

1.4.1 Touchscreen Kiosk Interactives with CMS

CMI is currently using a custom-built CMS in the exhibition spaces, running on PHP 5.4, to manage several of its touchscreen interactives. These interactives include:

- a) Oral History Gallery (4 touchscreens with the same content on each)
- b) Story Stations (31 total touchscreens throughout the museum, each with unique assets but using the same template)
- c) Building Communities (1 touchscreen)
- d) Pier 21 Memories Album (1 touchscreen)

1.4.2 Touchscreen Kiosk Interactives without CMS

CMI currently has a variety of one-off touchscreen interactive screens throughout the exhibitions which we would like to be able to update with a CMS. Most of these interactives were custom-built using Flash. These interactives include:

- a) Customs Challenge (1 touchscreen)
- b) What Would You Do? (1 touchscreen)

- c) Where to Live? (1 touchscreen)
- d) Pier 21 Site Model (2 touchscreens with the same content)

Two interactives consist of touchscreens connected to projectors and computers built with custom specs. They have no CMS but can currently be manually updated via an editable text database.

- a) Waves of Immigration (1 touchscreen and projection): to be migrated into CMS as part of current scope of work
- b) Belonging Quilt (1 touchscreen and projection): to be migrated into CMS in future phases.

1.4.3 Kiosk Hardware

CMI interactives are currently using 15" and 32" touchscreens, all connected to Intel NUCs. Touchscreens are a mix of ELO and Philips screens with PQLAB touch overlays. Most have accompanying sound cups for visitors to use for listening to audio.

1.4.4 Other Onsite Software and Hardware

CMI's current onsite infrastructure for digital experiences also includes:

- a) **BrightSign** – CMI uses BrightSign media players, connected to various projectors, screens and speakers throughout the museum for non-interactive plug-and-play content (e.g. audio, films). CMI plans to keep BrightSign, as well as its CMS, for these experiences. We may consider migrating such content to the new CMS if appropriate in the future.
- b) **Medialon** – CMI uses Medialon, a show control solution which provides digital-based control of all exhibition AV hardware. CMI plans to continue use of Medialon, and any exhibition digital infrastructure needs to be compatible.
- c) **Spectrio** – CMI currently uses Spectrio to manage four digital signage screens at the museum's front entrance. Migration of current digital signage content data is not required as part of this scope of work.

1.4.5 Internet Connectivity

The majority of our touchscreen interactives have hard-wired internet connection available for updates. However, due to the infrastructure limitations of the rented space where the museum is located, there are certain areas where hardwired connection is not, and will not be, possible. This is currently the case for two touchscreens (on the Pier 21 Site Model).

1.5 Desired End State

1.5.1 Current touchscreen kiosk interactives

CMI would like all interactives listed in 1.4.1 and 1.4.2, except for the Belonging Quilt, to be migrated into the new CMS as part of the current scope of work.

By the end of the project, the CMS should also be able to support the following new experiences:

- a) **Accessible App:** A mobile app, progressive web app, or responsive web app which provides an accessible alternative for visitors, including those with disabilities, to engage with exhibit content.
- b) **Digital Signage (Entrance screens, Special Events signage):** Non-interactive screens with static and dynamic content to provide key visitor information.

1.5.2 **Visitor Engagement Touchscreens**

Touchscreens offering opportunities for visitor engagement beyond exhibition content, including ability for users to:

- a) Search/browse a database to locate a specific plaque in the museum.
- b) Complete a visitor survey.
- c) Sign up for CMI's newsletter
- d) View gift shop promotions.

1.5.3 **Donor Recognition Touchscreens**

Interactive content to highlight CMI donors.

1.5.4 **Built-in scalability for future interactive screens and digital experiences**

CMI is looking to select a CMS which can be leveraged for a variety of future interactives and digital experiences which are not yet conceived. The selected CMS will provide built-in functionality for staff to create new templates for new exhibitions with minimal external support required. Alternatively, the current scope of work can include creating a selection of templates for future use.

1.5.5 **Redundancy**

CMI is looking to select a CMS that has some onsite redundant features included. The exhibits are expected to continue running in the event of an internet outage and the cloud system becomes inaccessible. A local cache server that is updated by the cloud system or equivalent solution must be provided.

1.6 Key Areas of Improvement

The new CMS should allow CMI to meet its project goals by delivering the following key improvements and functionality.

1.6.1 **Accessibility**

CMI is committed to preventing and eliminating barriers to accessibility. To help meet CMI's project goal to make the Museum's content more accessible to all visitors, including those with disabilities, project outcomes should include the following key improvements and functionality:

- a) **Improved Kiosk Accessibility:** The CMS should support a wide range of accessibility features, to make exhibitions more accessible for visitors who have vision, hearing, cognitive, dexterity impairments or other disabilities, and to support compliance with EN 301 549 and WCAG 2.1 AA. Desired accessibility features include:
 - Compatibility with screen reader software.
 - Text-to-speech output.

- Speech-to-text input.
 - Support for addition of descriptive video, descriptive transcripts, and closed captioning (in both languages).
 - Ability for visitors to adjust accessibility settings (e.g., adjustable text size, magnification, colour contrast/multiple colour schemes, touch latency, screen brightness).
 - Support for connecting accessible peripherals/hardware to kiosks such as keyboards or keypads, Bluetooth/plug-in audio or hearing aids.
- b) Accessible App: CMI is committed to preventing and eliminating barriers to accessibility. Full details on our Accessibility Plan can be found at: <https://pier21.ca/sites/default/files/accessibility/CMI-accessibility-plan.pdf>. To further support accessibility, the CMS should allow CMI to provide a digital alternative for visitors to access exhibit content on their own devices via a mobile app, progressive web app or responsive web app. Visitors should be able to access exhibit content relevant to where they are physically located, integrating technology such as via QR codes and/or beacons. Support of additional wayfinding functionality or capabilities is preferred.

1.6.2 Full Bilingual Support

The CMS must support full bilingual functionality (English/French) and language switching for all frontend experiences, with ability for the end user to switch into the alternative language version from any screen.

1.6.3 Streamlined content management process

To help meet CMI's project goal to simplify and streamline content management process, both for current needs and in adding future features and experiences, project outcomes should include the following key improvements and functionality:

a) Ease of use for content managers

The CMS should offer a user-friendly and browser-based admin interface with a low learning curve that is suitable for casual users. It should be easily operated by a range of non-technical content managers from across the organization, to manage specific content relevant to their area.

Non-technical CMS users should be able to edit not only text and assets, but also to edit kiosk and signage templates and to add new endpoints (kiosks, signage, exhibits, etc). The CMS should provide support for collaborative workflows, allowing multiple museum staff members to contribute, review, and approve content before publication.

b) Variety of templates and functionality

The CMS should offer a range of built-in templates and components which can be customized by non-technical CMS users to offer engaging experiences for visitors, including for:

- Kiosk interactives

- Digital signage
- Visitors' personal mobile devices

The CMS should allow non-technical users to implement a range of interactive functionality, including but not limited to:

- Quizzes
- Drag-and-drop activities
- Digital labels
- Interactive Maps
- Surveys
- Visitor-generated content
- Motion-activated and motion-controlled content

1.6.4 **Digital Asset Management capabilities**

The CMS should provide robust digital asset management functionality and support, including:

- a) Ability for CMS administrators to customize metadata fields for assets.
- b) Ability to synchronize digital assets and their metadata using a RESTful API.
- c) Ability for CMS users to see when, and for what exhibitions, assets were used.
- d) Ability to archive assets, and for CMS users to determine whether an asset in the CMS is currently in use for a live exhibit.
- e) Asset version control and tracking.

1.6.5 **Portability of experiences**

The CMS should offer the ability to export experiences onto a USB for manual uploading and updates onto devices. Such functionality would allow CMI to use the CMS to create content and experiences for:

- a) Kiosks and devices used in CMI Travelling Exhibitions.
- b) Kiosks within CMI which cannot be connected to hardwired internet connection (e.g., site model touchscreens).
- c) Displaying non-interactive content playlists (notices, videos, images) in the museum's theatre.

1.6.6 **Offer futureproofing through current capabilities and ongoing roadmap**

The CMS solution should be modern, scalable and adaptable to accommodate future expansions and evolving technology trends such as augmented reality, virtual reality and more.

1.6.7 **Interoperability and Integrations with other software**

The CMS should support a variety of integrations and interoperability with other software and systems, including:

- a) Argus Collections Management Software: For integrating digital assets and their metadata from CMI's collections (images, documents) into interactives. Integration

- would ideally allow for two-way update synchronization using a RESTful API.
- b) Drupal: For integrating content from CMI’s website CMS, including data about plaques and plaque location for Visitor Engagement touchscreen interactives.

Other potential integrations could include:

- c) BrightSign CMS: For integrating CMS content to BrightSign media players.

1.6.8 Improved data and analytics reporting

To help meet CMI’s project goal to improve the collection of, and staff access to, data and analytics about visitor engagement with our exhibits (to allow CMI staff to continually iterate and improve visitor experience and content delivery), project outcomes should include robust data, analytics and reporting features.

The CMS data, analytics and reporting capabilities should allow CMI to collect, analyze, and present data related to visitor engagement and content performance on the interactive kiosks, offering insights on:

- a) How long people spend on different experiences and specific screens.
- b) How visitors interact with exhibits (number of visits, screen views per visit, most popular screens, drop-off points, usage by language, etc).
- c) Compiled visitor responses, scores or outcomes of interactive components and surveys.
- d) How visitors move around the space and between exhibitions via heatmap visualization (i.e. with RFID integration, WiFi tracking, Ultra-wideband (UWB), beacons or otherwise).

1.7 Projected Scope of Work

The vendor will oversee, coordinate, and ensure a successful delivery of the full end-to-end implementation process of the new CMS, including:

1.7.1 Project Management

- a) Dedicated project manager to coordinate each phase, assign tasks, maintain effective communication and collaboration with CMI staff, and keep project milestones on schedule.

1.7.2 Kickoff, Discovery, and Planning

- a) Project kickoff and team member introductions, including review of roles and responsibilities.
- b) Discovery sessions as needed to complete a thorough assessment of CMI’s requirements in context of vendor’s software and solution.
- c) Work with CMI to define and prioritize features and approach for touchscreens, digital signage, and app experience.
- d) Provide recommendations and guidance to best meet project goals, desired outcomes, budget, and schedule.
- e) Create detailed implementation plan and project schedule to reflect any additional decisions or modifications fleshed out during discovery phase.

1.7.3 Design and Template Customization

- a) Update existing touchscreen designs for improved accessibility, following WCAG 2.1 AA and EN 301 549 guidelines.
- b) Work closely with CMI staff, lead the design and template selection/creation process for new touchscreen, digital signage and app experiences.
- c) Incorporate CMI brand guidelines where applicable.

1.7.4 Accessibility Support and Integration

- a) Prioritize accessibility and inclusive design through every stage of the planning, design, development, testing and deployment process.
- b) Implement accessibility best practices aligned with EN 301 549 and WCAG 2.1 AA.
- c) Facilitate usability and audience testing of experiences with people of diverse disabilities and levels of digital literacy.

1.7.5 CMS Set up and Configuration

- a) Customize and configure CMS features and functionality.
- b) Set up and configure CMS user profiles, account and permission settings.
- c) Implement and troubleshoot third-party integrations, including Argus.

1.7.6 Content Migration and Population

- a) Migrate and format content from existing interactives outlined in 1.7.11 into new CMS.
- b) Populate CMS with new content as needed. Content writing or editing and translation is outside of the current scope and will be provided by CMI.

1.7.7 Quality Assurance and User Acceptance Testing

- a) Conduct comprehensive testing to ensure the CMS and front-end experiences function as expected and are free of errors or bugs.
- b) Facilitate user acceptance testing by CMI staff on devices used in the museum to validate that the system meets their requirements.
- c) Address and resolve any issues identified during testing.

1.7.8 Documentation and Training

- a) Develop a training plan tailored to different user roles within CMI.
- b) Deliver training for CMI staff.
- c) Provide user manuals and documentation, customized to CMI's specific CMS setup as required, for CMI staff reference during ongoing CMS usage.

1.7.9 Deployment

- a) Work with CMI to create and execute a deployment strategy that minimizes disruption to museum operations and visitor experiences.
- b) Oversee and facilitate deployment of CMS content onto museum devices.
- c) Offer immediate support and monitoring during the initial days following deployment to address any unexpected issues.

10. **Maintenance and Support**

Three-year license including maintenance and support, bug fixes and regular software updates.

1.7.11 **Summary of work required for current interactives**

The following tables provide more details on the user experience and key features/functionality of CMI's current kiosk interactives, as well as a summary of the work required for each experience moving forward.

Table 1: Current Interactives with CMS

| Name | Summary of User Experience; Key Features and Functionality | Summary of work required |
|--|--|--|
| <p>Oral History Gallery (currently 4 touchscreens with the same content on each)</p> | <p>Ability for visitors to watch oral history interview videos from CMI’s collection.</p> <p>Currently offers visitors the ability to browse and watch over 300 videos, organized by theme.</p> | <p>Create a new user experience for engaging with content, both to improve accessibility as well as to increase engagement and effectiveness.</p> <p>Migrate content for updated experience to the new CMS.</p> |
| <p>Story Stations (currently on 31 total touchscreens throughout the museum, each screen with unique content but using the same template)</p> | <p>Each Story Station touchscreen highlights a different theme, and offers several videos related to that theme. Visitors can select and watch videos from the available options for that theme.</p> | <p>Create a similar UX/UI experience in new CMS, updating primarily to improve accessibility.</p> <p>Migrate current content to new CMS.</p> <p>Create a simplified UX with a more curated experience for select Story Stations (i.e. no menu selection, just one video to watch), to be able to test comparative effectiveness.</p> |
| <p>Building Communities (1 touchscreen)</p> | <p>Visitors can explore a range of communities, including text, images, and videos for each community.</p> | <p>Create a similar UX/UI experience in new CMS, updating primarily to improve accessibility.</p> <p>Migrate current content to new CMS.</p> |
| <p>Pier 21 Memories Album (1 touchscreen)</p> | <p>From the home screen, visitors select one of six photo albums to explore.</p> <p>Within each photo album, visitors can scroll through photos, and click on each photo to learn more.</p> | <p>Create a similar UX/UI experience in new CMS, updating primarily to improve accessibility.</p> <p>Migrate current content to new CMS.</p> |

Table 2: Current Interactives without a CMS

| Name | Summary of User Experience; Key Features and Functionality | Summary of work required |
|--|---|--|
| <p>Customs Challenge (1 touchscreen)</p> | <p>From the home screen, visitors select an identity and date (e.g. Scottish merchant, 1930) from three options.</p> <p>Visitors select which items they want to pack, from various options on screen. They view details of the journey on a map. At the Customs screen, they answer questions from a custom officer about what the items they brought and are provided info on what items are allowed or seized in order to clear customs.</p> | <p>Create similar UX/UI experience in new CMS, updating primarily to improve accessibility.</p> <p>Migrate current content to new CMS.</p> |
| <p>What Would You Do? (1 touchscreen)</p> | <p>From the home screen, visitors select a real-life refugee scenario from Canada’s history from two options (e.g. Tamil refugees in 1986).</p> <p>After exploring relevant videos, text, images, and documents to learn more about the scenario, visitors make a choice about whether to allow the refugees into Canada. Visitors can then view results of how all visitors have chosen, as well as read more about what really happened.</p> | <p>Create similar UX/UI experience in new CMS, updating primarily to improve accessibility.</p> <p>Migrate current content to new CMS.</p> |
| <p>Where to Live? (1 touchscreen)</p> | <p>From the home screen, visitors choose an identity and time period. They can then select where to live by exploring the pros and cons of different places/provinces.</p> <p>Content to explore is a mix of text, images and videos.</p> | <p>Create similar UX/UI experience in new CMS, updating primarily to improve accessibility.</p> <p>Migrate current content to new CMS.</p> |

| | | |
|--|---|---|
| <p>Pier 21 Site Model interactives (2 touchscreens with the same content)</p> | <p>Visitors can explore video, audio, text and image content.</p> | <p>Create similar UX/UI experience in new CMS, updating primarily to improve accessibility.</p> <p>Migrate current content to new CMS.</p> |
| <p>Waves of Immigration (1 touchscreen and projection)</p> | <p>On the touchscreen is an interactive graph of immigration rates over the years.</p> <p>By scrolling through and selecting a year on the touchscreen, visitors can see more details about Canadian immigration that year on the nearby projected screen.</p> | <p>Create a similar UX/UI experience in new CMS, updating primarily to improve accessibility.</p> <p>Migrate current content to new CMS.</p> |
| <p>Belonging Quilt (1 touchscreen and projection)</p> | <p>On the touchscreen, visitors select an image, and then a word, that best describes their identity as shaped by immigration. Visitors can also write in their own word.</p> <p>Once completed, visitors can see their image and word in a chevron-shaped design. They can then submit their design to be projected alongside other visitors' chevrons in a quilt design on the projected screen in front.</p> <p>Administrators can blacklist words from being input or delete inappropriate words which have been added by visitors.</p> | <p>CMS should support requirements for this interactive, however it will not be migrated in the current scope of work.</p> <p>Experience to be reworked to increase visitor impact and migrated into the CMS in a future phase.</p> |

2. Contract Terms and Conditions

2.1. Standard Instructions, Clauses and Conditions

CMI applies clauses from the Standard Acquisition Clauses and Conditions Manual (<https://buyandsell.gc.ca/policy-and-guidelines/standard-acquisition-clauses-and-conditions-manual>) to its contracts. Proponents who submit a bid agree to be bound by the instructions, clauses and conditions of the bid solicitation and accept the specified clauses and conditions in the resulting contract.

2.2. Supplemental Terms and Conditions

2.2.1. Contract Duration, Renewal and Cancellation

The Contract shall begin in late February, 2024. Project deployment will be complete by January 31, 2025 with full integration of the software complete by March 31, 2025. Licensing anticipated to begin April 1, 2025. With successful development and integration phases complete, CMI may enter into a five-year service contract with the Contractor. CMI may renew the term of the contract each year up to an additional five years based on satisfactory deliverables review. Cancellation can be initiated by CMI through a written notice, with a 30-day notice period.

2.2.2. Terms of Payment

- a) The Contractor shall submit a completed T1204 form.
- b) Fees and expenses payable by CMI shall constitute the Contractor's only remuneration under the Agreement. Neither the Contractor nor its personnel shall accept any trade commission, discount, allowance or indirect payment of other consideration in relation to the Services.
- c) The Contractor shall be solely responsible for all federal and local income and other taxes that are due on the income received by the Contractor for the services performed hereunder. CMI shall be solely responsible for any sales taxes levied by the jurisdiction in which the Agreement takes place.
- d) Unless otherwise stated in this Agreement, all references to currency shall be deemed to be in Canadian dollars. CMI shall pay the Contractor in Canadian dollars by either Electronic Funds Transfer or direct deposit (Canadian banks only), cheque, bank draft (certified cheque) or Visa.
- e) Invoices for Services shall be billed on a monthly basis. Invoices must include:
 - A date;
 - Name and address of Contractor;
 - The services included on the invoice;
 - HST charged at 15%. HST must be specified on all invoices as a separate item.

2.2.3. Legislative Requirements

- a) The contract will be interpreted and governed, and the relations between the parties determined, by the laws in force in the province of Nova Scotia.
- b) The Contractor shall be responsible for compliance with all current Canadian

Federal, Provincial and Municipal Acts, Orders, Regulations and Laws which exist or may come into existence during the term of the Agreement.

- c) The Contractor certifies that it will comply with the eight fundamental human and labour rights as per the Ethical Procurement Certification and attached as part of their Proposal. Non-compliance of fundamental human and labour rights may result in termination of the contract.

2.2.4. Insurance

Any and all insurance necessary for the Contractor to carry out the Services will be determined and provided by the Contractor. CMI provides no insurance and accepts no liability.

2.2.5. Representations and Warranties

The Contractor agrees that all Services to be provided by it hereunder shall be provided in a professional manner by personal appropriately trained in the performance of such services.

2.2.6. Changes, Alterations and Amendments

Changes in the terms and conditions of the contract may be made only by written agreement of the Parties.

2.2.7. Excusable Delay

- a) A delay in the performance by the Contractor of any obligation under the Agreement could be considered an "Excusable Delay" if it caused by an event that:
- Is beyond the reasonable control of the Contractor;
 - Could not reasonably have been foreseen;
 - Could not reasonably have been prevented by means reasonably available to the Contractor;
 - Occurred without the fault or neglect of the Contractor.
- b) A delay will be qualified as an "Excusable Delay" if the Contractor advises CMI of the occurrence of the delay or of the likelihood of the delay as soon as the Contractor becomes aware of it. The Contractor must also advise CMI, within 15 working days, of all the circumstances relating to the delay and provide to CMI for approval a clear work around plan explaining in detail the steps that the Contractor proposes to take in order to minimize the impact of the event causing the delay.
- c) Any delivery date or other date that is directly affected by an Excusable Delay will be postponed for a reasonable time that will not exceed the duration of the Excusable Delay. However, if an Excusable Delay has continued for 30 days or more, CMI may, by giving notice in writing to the Contractor, terminate the Agreement. In such a case, the Parties agree that neither will make any claim against the other for damages, costs, expected profits or any other loss arising out of the termination or the event that contributed to the Excusable Delay. The Contractor agrees to repay immediately to CMI the portion of any advance payment that is unliquidated at the date of the termination.

Unless CMI has caused the delay by failing to meet an obligation under the Agreement, CMI will not be responsible for any costs incurred by the Contractor as a result of an Excusable Delay.

2.2.8. Justifiable Cause

If the Contractor fails to fulfil the Agreement for any reason other than a justifiable cause not in the Contractor's control, the Contractor shall be liable for all reasonable expenses incurred by CMI. Otherwise, the Contractor and CMI shall bear their respective costs.

2.2.9. Indemnity

The Contractor covenants to indemnify and safe harmless CMI, its directors, officers, employees and agents from any against any and all liabilities, losses, claims, demands, building damage, costs, and expenses (including lawyer's fees and litigation expenses on a solicitor and client basis) whatsoever to which CMI, its directors, officers, employees and agents may become subject as a result of the breach of any covenant, agreement, term, or condition of this Agreement or as a result of or in connection with the use and occupation of the Premises, by the Contractor or its servants, agents, employees, contractors, invitees, or others for whom it is in law responsible except where caused by the negligence or willful misconduct of CMI or those whom it is in law responsible.

2.2.10. Access to Information

The Contractor acknowledges and understands that CMI is subject to the *Privacy Act* (<https://laws-lois.justice.gc.ca/eng/ACTS/P-21/index.html>) and *Access to Information Act* (<https://laws-lois.justice.gc.ca/eng/acts/a-1/>), and it may, as a result of specific request made under the Act, be required to release this complete document or any other documents it has received related to the contract. The Contractor must clearly indicate "Confidential" on items considered to be company confidential or proprietary information.

2.2.11. No Promotion of Relationship

Any publicity or publication related to the contract shall be at the sole discretion of CMI. Without limiting the foregoing, the Contractor shall not make use of its association with CMI, directly or indirectly communicate with the media in relation to the contract, the subject matter, or undertake any communication that in the opinion of CMI is unsolicited promotional communication relating to the contract, without prior written consent of CMI.

2.2.12. Assignment

No right of interest in the Contract shall be assigned by either Party without the written consent of the other and no delegation owed, or the performance of any obligation by

either CMI or the Contractor shall be made without the written consent of the other.

2.2.13. Termination of the Agreement

In the event that either Party believes that the other materially has breached any obligations under the contract such party shall so notify the breaching party in writing. The breaching party shall have 30 days from the receipt of notice to cure the alleged breach and to notify the non-breaching party in writing that a cure has been effected. If the breach is not cured within the 30 days, the non-breaching party shall have the right to terminate the contract without further notice.

2.2.14. Force Majeure

The Contractor is not liable for failure to perform the obligations as set out in the contract as a result of acts of God (including fire, flood, earthquake, storm, hurricane or other natural disasters), war, invasion, act of foreign enemies, labor dispute, strike or lockout. If the Contractor asserts Force Majeure as an excuse for failure to perform their obligations, they must prove that reasonable steps were taken to minimize delay or damages cause by foreseeable events that the Contractor substantially fulfilled all non-excused obligations and CMI was timely notified of the likelihood or actual occurrence of the event which invoked the Force Majeure.

2.2.15. General provisions

- a) Values: CMI pursues environment that is respectful of the lived experiences of others, that considers diverse perspectives, and that fosters meaningful relationships within the community. CMI values diversity, equity, justice, and inclusion. CMI encourages the Contractor to engage in this conversation.
- b) Accessibility: CMI pursues an accessible environment as defined in the Accessible Canada Act. Our Museum is for everyone. We are respectful and welcoming. We focus on including people. We build accessible spaces. We work to meet the needs of persons with disabilities. We strive for: a barrier-free workplace; a safe and accessible site; easy-to-use websites; accessible exhibitions, programs and services.
- c) Harassment: The Contractor and Contractor representative(s) acknowledges the responsibility of CMI to ensure, for its employees, volunteers, contractors, or any other individual employed by, or under contract with CMI, a healthy work environment, free of harassment.

The Contractor and Contractor representative(s) must not, either as an individual, or as a corporate or unincorporated entity, harass, abuse, threaten, discriminate against or intimidate any employee, volunteer, contractor or other individual employed by, or under contract with CMI. The Contractor will be advised in writing of any complaint and will have the right to respond in writing. Upon receipt of the Contractor's response, CMI will, at its entire discretion, determine if the complaint is founded and decide on any action to be taken including cancelling the contract in whole or in part.

- d) Relationship between the Parties: The relationship of the parties shall be that of independent contractors. Nothing shall be construed as establishing or creating a relationship between CMI and the Contractor. This Agreement is made for the sole benefit and protection of the parties hereto and not for the benefit of any third party.
- e) Conditions not to be waived: No waiver by either party of any default by the other in performing any provision of this Agreement shall operate or be construed as a waiver of any other default, whether or a like or different character.
- f) Severability: Should any provisions of this Agreement be held to be invalid or unenforceable then such provisions shall be given no effect and shall be deemed not to be included in this Agreement but without invalidating any of the remaining provisions of the Agreement. The Contractor and CMI shall then use all reasonable endeavors to replace the invalid or unenforceable provision by a valid provision, the effect of which is as close as possible to the intended effect of the invalid or unenforceable provision.

3. Submission of Proposals

3.1.Key Dates

Table 3: Key RFP Dates

| Item | Date |
|------------------------|---|
| RFP Issued | 27 October, 2023 |
| Question Period Ends | 23 November, 2023 |
| RFP Closes | 7 December, 2023 at 3 pm AST (1 pm EST) |
| Software Demonstration | Week of January 8, 2024 |
| Notification of Award | Early February, 2024 (estimate) |

3.2.Form of Submission

- 3.2.1. The Proponent must submit their proposal according to Section 4 (Proposal Submittal Documentation).
- 3.2.2. If a consortium or team submits a proposal a clear “lead” must be identified that will be legally responsible for the contract. CMI will enter into contract with only one Agency or Joint Venture organization. Only a complete team or consortium deemed to be able to complete all aspects of the Services shall be considered for award.

3.3.Proposal Submission Instructions

- 3.3.1 Proposals shall be delivered electronically to:
Ashley MacPherson, VP Operations

procurement@pier21.ca

- 3.3.2 Proposals must be submitted and received at this address by December 7, 2023 at 3 p.m. AST (2 pm EST) according to CMI's internal servers. Timely receipt and correct direction of the proposals shall be the sole responsibility of the Proponent.

3.4. Proponent Enquiries

- 3.4.1. All enquiries regarding the proposal solicitation shall be submitted in writing or by email. All questions are due by November 23, 2023 at 3 pm AST (2 pm EST). Answers to questions will be provided on ongoing basis and will be issued as addenda. Direct enquiries to Ashley MacPherson, VP Operations; procurement@pier21.ca
- 3.4.2. To ensure consistency and quality of information provided to Proponents, CMI will provide, simultaneously to all, any information in respect to enquiries/questions received and the replies to such enquiries/questions without revealing the sources of enquiries.
- 3.4.3. Proponents are only permitted to communicate with the VP Operations or designate. Non-compliance with this condition during the solicitation period may (for that reason alone) result in disqualification of the Proponent's proposal.
- 3.4.4. Proponents shall promptly examine all documents and addenda comprising this RFP and shall report any errors, and seek clarification of apparent errors, ambiguities, or other problems as soon as identified. It is the Proponent's responsibility to avail themselves of all the necessary information to prepare a compliant proposal in response to this RFP. The Evaluation Committee is under no obligation to seek clarification of a Proponent's proposal.

3.5. Amendments, Withdrawal, and Disqualification

- 3.5.1. The Proponent may, at their discretion, substitute the applicable laws of a Canadian province or territory of their choice without affecting the validity of their proposal, by deleting the name of the Canadian province or territory specified and inserting the name of the Canadian province or territory of their choice. If no change is made, it acknowledges that the applicable laws specified are acceptable to the Proponents.
- 3.5.2. In the event that a Proponent wishes to withdraw its Proposal, the Proponent shall immediately notify the VP Operations or designate in writing or by email, before the RFP closing date. Should a proposal be withdrawn, it will be returned to the Proponent after the closing date, and no further consideration will be given to it.
- 3.5.3. After the closing date and time, amendments to the Proponent's proposal will not be accepted.

3.6. Costs Related to the Solicitation Process

- 3.6.1. All costs and expenses incurred by the Proponent related to the preparation of the proposal shall be borne by the Proponent. CMI is not liable to pay such costs and expenses or to reimburse or to compensate Proponents under any circumstance.

- 3.6.2. CMI shall not be responsible for any costs related to any delays in the RFP, in awarding the contract, or costs associated with any review or the approval process, or with obtaining any government approvals.

3.7.No Bribe or Conflict

- 3.7.1. The Proponent declares that no bribe, gift, benefit, or other inducement has been or will be paid, given, promised or offered directly or indirectly to any official or employee of CMI or to a member of the family of such a person, with a view to influencing the entry into the Contract or the administration of the Contract.
- 3.7.2. The Proponent must not influence, seek to influence or otherwise take part in a decision of CMI knowing that the decision might further its private interest. The Proponent must have no financial interest in the business of a third party that causes or would appear to cause a conflict of interest in connection with the performance of its obligations under the Contract. If such a financial interest is acquired during the period of the Contract, the Proponent must immediately declare it to CMI.
- 3.7.3. The Proponent warrants that, to the best of its knowledge after making diligent inquiry, no conflict exists or is likely to arise in the performance of the Contract. In the event the Proponent becomes aware of any matter that causes or is likely to cause a conflict in relation to the Proponent's performance under the Contract, the Proponent must immediately disclose such matter to CMI in writing.
- 3.7.4. If CMI is of the opinion that a conflict exists as a result of the Proponent's disclosure or as a result of any other information brought to CMI's attention, CMI may require the Proponent to take steps to resolve or otherwise deal with the conflict or, at its entire discretion, terminate the Contract for default. Conflict means any matter, circumstance, interest, or activity affecting the Contractor, its personnel or subcontractors, which may or may appear to impair the ability of the Contractor to perform the Work diligently and independently.

3.8.Evaluation Criteria and Process

- 3.8.1. Proponents are hereby advised that failure to provide all of the information and documentation to the degree specified in the RFP and in the format indicated may result in their proposal being assessed as non-compliant, or in the case of rated requirements no points or lesser points will be assigned to the criteria. The criteria specified in this RFP, as possibly amended by Solicitation Amendments, are the sole criteria that will be used in the evaluation of proposals.
- 3.8.2. Based on the best overall value to CMI, proposals will be assessed using the criteria specified herein.
- 3.8.3. There shall be no public opening of the proposals received in response to this RFP.
- 3.8.4. Proposals will be evaluated and scored in accordance with the following criteria:

Table 4: Evaluation Criteria

| Criteria | Points |
|---|--------------------|
| Company Information and Case Studies (Sections 4.1 and 4.2) | 5 |
| References (Section 4.3) | 5 |
| Project Approach (Section 4.4) | 10 |
| Pricing and Fees (Section 4.5) | 20 |
| Technical and Functional Requirements (Section 4.6) | 60 |
| Preliminary Evaluation Score (proposal criteria) | /100 points |
| Secondary Evaluation Score (software demonstration) | /100 points |
| Total Evaluation Score | /200 points |

3.9 Process

- 3.9.1 An Evaluation Committee shall evaluate the proposals. Decisions as to the degree to which a proposal meets the requirements of this RFP are within the exclusive judgment of the Evaluation Committee.
- 3.9.2 The Evaluation Committee shall conduct a Preliminary Evaluation of each Proponent. Proponents who receive the highest or second highest score out of the in the Preliminary Evaluation round shall be eligible for Secondary Evaluation. The degree to which a Proponent’s proposal is acceptable is at the sole discretion of the Evaluation Committee.
- 3.9.3 The Evaluation Committee will contact the top two (2) Proponents from the Preliminary Evaluation for Secondary Evaluation – Software Demonstrations. If there is a tie for second, all second place Proponents will be invited for a Software Demonstration. Total scores shall be calculated by adding Preliminary and Secondary scores together.
- 3.9.4 It is the intent of CMI that the Proponent with the highest score overall shall be recommended for contract award.

3.10 CMI’s Rights

CMI reserves the right to:

- 3.10.1 Ask any Proponent to provide proof that they have the necessary management structure, skilled personnel, experience, programs, and software to perform competently the work identified in this RFP.
- 3.10.2 Cancel and or reissue this RFP at any time; CMI will not assume liability for any

response preparation costs whatsoever.

- 3.10.3 Request clarification or supporting data for any point in a Proponent's proposal.
- 3.10.4 Negotiate with Proponents subject to the constraints of the mandatory requirements of this RFP.
- 3.10.5 Make changes to this RFP, including substantial changes provided that those changes are issued by way of a Solicitation Amendment in writing, and is issued prior to the RFP closing date. CMI may do so without incurring any liability whatsoever to any of the Proponents.
- 3.10.6 Maintain sole ownership of the proposals. All materials submitted by a Proponent in response to any part of this RFP shall become the sole property of CMI without payment or liability for payment.

3.11 Notification, Award and Debriefing

- 3.11.1 Once the successful Proponent and CMI have executed a Contract, CMI will communicate the name of the successful Proponent to all Proponents who have submitted a proposal.
- 3.11.2 CMI will provide a debriefing of a Proponent's proposal, if requested in writing, within ten (10) days of notification that they have been unsuccessful. Requests must be submitted to the VP, Operations or designate.

3.12 RFP/Offer

This RFP does not constitute an offer of any nature or kind whatsoever by the Canadian Museum of Immigration at Pier 21 to any Proponent. CMI reserves the right to reject all proposals, in whole or in part, and/or to enter into negotiations with any party to provide such products and/or services to CMI.

4. Proposal Submission Documentation

4.1 Company Information

Request for Proposal Content Management System:

Table 5 Proponent Company Information

| Proponent Company Information |
|--|
| Lead Legal Agency Name |
| |
| Legal Agency Name (if required) |
| |
| Full Address |
| |
| Telephone |
| |
| Business (GST) Number |
| |
| Email Address |
| |
| Name and title of person authorized to sign on behalf of the Proponent (Type or Print) |
| |
| Proponent Signature |
| |
| Name and Title of Project Contact if different from signatory above (Type or Print) |
| |
| Contact Person Email |
| |

4.2.Addenda

Addenda may be issued by CMI regarding any changes and answers to questions that may arise during the solicitation period. Completion of this section will ensure that you have received and factored this information into your proposal. Failure to identify addenda issued by CMI may result in the disqualification of your proposal.

Table 6: Addenda

| Addendum Number | Date Issued |
|-----------------|-------------|
| | |
| | |
| | |
| | |

4.3. Company Profile

Provide a summary of your company and its suitability for this project. Details should include:

- 4.3.1 Company size, number of employees, and number of years in business.
- 4.3.2 Office locations, and which office will service and support this project if awarded.
- 4.3.3 Main areas of specialty and target industries.
- 4.3.4 Size of CMS user base.
- 4.3.5 Product vision and key value proposition for clients.
- 4.3.6 Main business problems your CMS aims to solve.
- 4.3.7 What your company and its product/services offer that sets it apart from other potential Proponents.
- 4.3.8 Whether any subcontractors or partner companies would be involved in delivering on the Scope of Work. If so, provide a summary of those companies/subcontractors as well.

4.4. Case Studies

- 4.4.1. Provide three (3) case studies about current or past clients that demonstrate your experience and successful outcomes in projects similar in scope, size, requirements, and functionality to this RFP. Case studies should ideally be from the GLAM (Galleries, Libraries, Archives, Museums) sector.
- 4.4.2. At least one (1) case study should demonstrate successful outcomes in meeting accessibility standards as outlined in EN 301 549 / WCAG 2.1 AA.

4.5 References

- 4.5.1 Provide three (3) references from clients with similar requirements that currently use your software. References should ideally be from the GLAM sector. Include the name, job title, email, and telephone number of the contact person for each organization.
- 4.5.2 CMI is subject to the *Privacy Act* and *Access to Information Act*, and it may, as a result of specific request made under the Act, be required to release this complete document or

any other documents it has received related to the procurement. Proponents must clearly indicate “Confidential” on items considered to be company confidential or proprietary information.

4.6 Project Approach

Please provide a description of your proposed solution and approach to the project. Your response should address the following key areas:

4.6.1 Solution Overview

Please provide a concise overview of your proposed CMS solution, highlighting its key features, capabilities, and how it will allow CMI to achieve our project goals and key areas of improvement.

4.6.2 Methodology

4.6.2.1 Describe the methodology you would follow to complete the project, including your approach to:

- Project Management
- Discovery and Planning
- Design and Template Customization
- Accessibility Support and Integration
- CMS Set up and Configuration
- Content Migration and Population
- Quality Assurance and User Acceptance Testing
- Training and Documentation
- Deployment

4.6.2.2 Provide details on expectations and requirements you would need from CMI or any external third-party for each phase. If there are any elements listed in Section 1.7 (Scope of Work) for which your approach differs from that listed, please indicate that in your response.

4.6.3 Project Schedule

Provide a schedule of work for the project, including key deliverables and milestones.

4.6.4 Risk Assessment and Management

Provide details on the key risks for the project, and what your approach to risk mitigation and management would be to minimize them.

4.6.5 Project Team

Provide details on the project team members from your company who would be involved in the project, including for each a summary of their role, relevant skills, and experience.

4.7 Pricing and Fees

4.7.1 Provide details on how your firm will be remunerated should you be selected. Provide an estimate, or range estimate, of total fees in Canadian dollars exclusive of tax.

4.7.2 Fees for Current Scope of Work

Provide a detailed breakdown for one-time fees to complete the current scope of work to successfully deploy the new CMS into CMI’s museum and processes, including all phases outlined in 1.7.1 through 1.7.9.

4.7.2.1 Include a breakdown by exhibit/kiosk/experience or type of experience (digital signage, interactive touchscreen kiosk, app) as applicable.

4.7.2.2 Include a breakdown by phase (Discovery/Planning, Design/Template Customization, Migration, Testing, Deployment, etc) as applicable.

4.7.2.3 Include details on any assumptions, dependencies, or inclusions/exclusions that will impact final fees.

4.7.3 Fees for Annual Licenses, Maintenance and Support

Provide details on your pricing model and an estimate, or estimated range, for an annual subscription (Hosted/SaaS) assuming a three-year contract period.

Include details on the following points, plus any other factors relevant to your pricing:

4.7.3.1 Assume a minimum of ten (10) simultaneous CMS users with data entry or administrative privileges; outline how number of users impacts pricing.

4.7.3.2 How number of exhibits/screens impacts pricing.

4.7.3.3 Product features and functionality which are included, and which would incur extra fees.

4.7.3.4 Support packages available, both for maintenance and support on current setup and on new template, features or screen creation/customization.

4.7.3.5 Hosting and disk storage capacity.

4.7.3.6 Additional storage costs, if available.

4.7.3.7 Include details on any assumptions, dependencies, or inclusions/exclusions that will impact final fees.

4.8 Technical and Functional Requirements

4.8.1 Content Management System Criteria Checklist

CMI has completed the Content Management Software Criteria Checklist and attached it to this RFP as Appendix A. Complete the Proponent portion in the same document.

Please preserve CMI’s answers in the copy submitted as part of the RFP response.

Failure to respond to this section may result in no further consideration being given to your Proposal.

4.8.2 Architecture, Technology, and Integration with CMI tools

4.8.2.1 Software and integrations

Describe your CMS architecture and software, and details on your CMS capabilities and limitations to integrate with CMI’s other digital tools and processes. Address the following points in your response:

- Any system requirements for CMS end users.
- Whether you offer a headless option, or an API. Provide an overview of the API

and the API tooling and documentation available.

- What programming language your CMS is written in, and whether it's a proprietary or open source platform.
- Capabilities and limitations to integration and synchronization with Argus Collections Management Software.

4.8.2.2 Hardware

The onsite local cache server (or equivalent) will be provided as a part of the scope of work. Remaining hardware procurement is not part of the current scope of work. CMI intends to procure any new hardware independent of the selected CMS. We would like to continue to use standard Windows PC hardware connected to touchscreens kiosks, and Medialon as our AV control system.

We are looking for a CMS which is not tied to specific hardware, but which is compatible with a wide variety of hardware. We would like the CMS to support a range of kiosk touchscreens, digital signage and screen endpoints of various sizes, configurations, and brands, including tablets, large-format, tabletop, horizontal, vertical, wall projection.

- Provide details on any limitations or considerations for hardware compatibility with your CMS.
- Provide details on your recommended approach for onsite redundant features – whether an onsite local cache server or equivalent solution - which would allow for continuous exhibit operation amidst an internet outage or the cloud system becoming inaccessible.

4.8.3 Hosting and Security

Describe in detail the hosting solution you are using, as well as security policies to protect CMS data. We are interested to know the specifics of the following:

- 4.8.3.1 Where our content would be hosted, cloud service providers used by your CMS (if applicable), and the physical security measures for the datacentre(s). Note that data needs to be hosted in Canada.
- 4.8.3.2 Failover, backup, redundancy, and disaster recovery systems in place, including how often backups are run.
- 4.8.3.3 Your procedures for detecting, reporting and responding to security incidents or breaches within the CMS.
- 4.8.3.4 How you handle the installation of security updates and patches to address vulnerabilities promptly.
- 4.8.3.5 Encryption methods and standards used to protect data both in transit and at rest within the CMS.
- 4.8.3.6 Any applicable security certifications or security standards applicable to your CMS.

4.8.4 Accessibility

The CMS vendor must demonstrate a commitment to accessibility through existing functionality and projected roadmap, and who can be a strong partner in helping CMI comply with EN 301 549 and WCAG 2.1 AA guidelines.

4.8.4.1 Provide details on why your CMS would be the best choice to support accessibility of CMI exhibits.

4.8.4.2 Address the following questions in your response:

- What accessibility features are currently built-in or supported by your CMS?
- How your product supports compliance with EN 301 549 standard, including WCAG 2.1 AA. Please note that all potentially relevant EN 301 549 clauses, and determination of conformance, are listed in Appendix B for Proponent reference.
- In what areas would your product not yet support full compliance with EN 301 549?
- Are there features or functionality on your product roadmap which will improve accessibility? Please provide details on what features, and when they are projected to launch.

4.8.5 **Accessible App**

Provide details on what option(s) your CMS offers to provide a digital alternative for visitors to access exhibit content on their devices.

4.8.5.1 What are the available options (i.e., mobile app, progressive web app, or responsive web app), and compatible platforms/devices (i.e., iOS, Android, tablet, mobile)?

4.8.5.2 How does the app experience enhance, interact with, or correspond with the onsite exhibit content? Does it offer a different experience than available on kiosks (i.e., guided tour, audio tour)? What possibilities or limitations are there in offering the same content from the exhibit touchscreen kiosks? What are the key features and functionality?

4.8.5.3 How does your app provide location-based content (i.e., beacons, QR codes)?

4.8.5.4 Accessibility features and functionality: how will the app increase accessibility to exhibit content for visitors without vision or limited vision, visitors without hearing or limited hearing, and with other disabilities?

4.8.5.5 Ease of use in managing app content alongside exhibit content: will content need to be managed in two different places?

4.8.5.6 Does the app include or support additional wayfinding features for museum visitors? If so, please describe.

4.8.6 **Templates and customization**

Provide details on the capabilities your CMS offers for CMS editors and content managers who are not developers, for interactive kiosks, digital signage, and app experiences. Address the following questions in your response:

4.8.6.1 Describe the range and quantity of templates which are available for CMS users, and key functionality that is available out-of-the-box (e.g. quizzes, games, digital labels, interactive maps, etc)

4.8.6.2 Describe the degree of template customization that is possible by non-technical CMS users.

4.8.6.3 Following the initial deployment, when CMI has a new requirement for a digital signage, kiosk or app experience which is not possible through available templates and customizations, what is the process for creating and maintaining those experiences? Are

custom design and development services offered by your company or a third-party?

4.8.7 Scalability and Futureproofing

Describe how your CMS can scale to accommodate future expansions, additional digital signage and interactive kiosk or app/web experiences following launch. Address the following questions in your response:

- 4.8.7.1 Following project completion, what is the process for CMI staff to create and manage new screens, exhibits and experiences? What support is needed? Is this support included in support packages or added on as needed?
- 4.8.7.2 Outside of the requirements outlined in this RFP, what value-add features and functionality does your CMS offer?
- 4.8.7.3 What capabilities or integrations does your CMS offer for other immersive or innovative technologies, such as augmented reality (AR), virtual reality (VR), IoT devices, and gaming?

4.8.8 Data Analytics and Reporting

Describe your CMS 'capabilities for data and analytics reporting. Include screenshots as helpful. Address the following elements in your response:

- 4.8.8.1 Describe key capabilities and limitations based on CMI's desired requirements outlined in Data and Analytics subsection of Appendix A.
- 4.8.8.2 Beyond tracking interactions with touchscreen interactive devices, describe any capabilities your CMS provides to generate heatmaps to visualize visitor flow and dwell times throughout the full museum spaces. Include details on any third-party work, technologies or integrations required, and whether this functionality is included in your proposed scope of work.

4.9 Supplier Code of Conduct

4.9.1 By submitting a proposal in response to this solicitation, the Proponent certifies that:

4.9.1.1 Child labour

The Proponent and its first-tier subcontractors do not employ child labour, i.e. work done by children who are younger than the minimum age for admission to employment indicated in applicable legislation in the country, and no younger than the age at which compulsory schooling has been set in applicable legislation in the country. In any event, children are protected from economic exploitation and from performing any work that is likely to be hazardous or to interfere with the child's education, or to be harmful to the child's health or physical, mental, spiritual, moral or social development. Employees younger than 18 shall not perform hazardous work, which includes work that may jeopardize their health, safety or morals.

4.9.1.2 Forced labour

The Proponent and its first-tier subcontractors do not use forced labour or compulsory labour in all its forms, including trafficking in persons for the purpose of forced or compulsory labour, namely any work or service that is exacted from any person under the menace of any penalty, and for which that person has not offered himself or herself voluntarily.

4.9.1.3 Abuse and harassment

The Proponent and its first-tier subcontractors treat their employees with dignity and respect. No employees shall be subject to any physical, sexual or verbal harassment, abuse or violence or psychological hazards. Corporal punishment is not used or tolerated in any form.

4.9.1.4 Discrimination

The Proponent and its first-tier subcontractors do not discriminate against their employees in hiring practices or any other term or condition of work (other than legitimate occupational requirements allowed by law) on the basis of race, national or ethnic origin, colour, religion, age, sex, sexual orientation, gender identity or expression, marital status, family status, genetic characteristics, disability or conviction of any offence for which a pardon has been granted or in respect of which a record of suspension has been ordered.

4.9.1.5 Freedom of association and collective bargaining

Where provided for by law, the Proponent and its first-tier subcontractors shall recognize and respect the right of employees to freely associate, organize and bargain collectively with their employer. No employee or worker representative shall be subject to discrimination, harassment, intimidation or retaliation as a result of his or her efforts to freely associate, organize or bargain collectively. Where the right to freedom of association is restricted under law, the Proponent and its first-tier subcontractors must provide workers alternative means of association, including effective means to express and remedy workplace grievances.

4.9.1.6 Occupational safety and health

The Proponent and its first-tier subcontractors provide workers with a safe and healthy work environment and, at minimum, comply with local and national health and safety laws. If residential facilities are provided to workers, they are safe and healthy.

4.9.1.7 Fair wages

The Proponent and its first-tier subcontractors provide wages and benefits which comply with all applicable laws and regulations and which match or exceed the local prevailing wages and benefits in the relevant industry or which constitute a living wage, whichever provides greater wages and benefits. Where compensation does not provide a living wage, the Proponent and its first-tier subcontractors shall ensure that real wages are increased annually to continuously close the gap with living wage.

4.9.1.8 Hours of work

Except in extraordinary circumstances, the Proponent's and its first-tier subcontractors' employees are not required to work more than the lesser of (a) 48 hours per week and 12 hours overtime per week, or (b) the limits on regular and overtime hours allowed by the law of the country of manufacture.

4.9.2 The Proponent do hereby offer to the Canadian Museum of Immigration at Pier 21 to diligently and faithfully provide the services in accordance with the terms and conditions of the RFP.

4.9.3 AND WE HEREBY AFFIRM AND CERTIFY that we:

4.9.3.1 Have examined to our satisfaction all conditions affecting the Scope of Work.

4.9.3.2 Have carefully studied the RFP, including all addenda.

4.9.3.3 Have not relied on any information or documents provided by or on behalf of the Museum other than the RFP.

4.9.3.4 Have included the information that was required to be submitted, which information forms an integral part of the Submittal Documentation.

4.9.4 AND WE HEREBY DECLARE, REPRESENT, WARRANT AND AGREE THAT:

4.9.4.1 The Proposal has been executed with full authority and is irrevocable, valid and open acceptance by CMI for a period of ninety (90) full days from the Closing Date irrespective of the acceptance of any other Proposal or the issue of a notice or acceptance of another Proposal. This Proposal is made by the undersigned without any connection, knowledge, and comparison of figures or arrangements with any other person who might submit a Proposal for the same Work and is in all respects fair and without collusion or fraud. Proposed sub-Suppliers (if any) have been given the opportunity to study the RFP.

Appendix A

Content Management System Criteria Checklist

Please refer to next page.

Appendix B

ICT Accessibility Requirements: [Guideline on Making Information Technology Usable by All](https://www.tbs-sct.canada.ca/pol/doc-eng.aspx?id=32620)
(<https://www.tbs-sct.canada.ca/pol/doc-eng.aspx?id=32620>)

Table 7: Appendix A

| Appendix A Table: Content Management System Criteria Checklist | | | | |
|---|--|--------------------|----|--------------------|
| Item | Description | Proponent Response | | |
| 1 | Accessibility - General/Kiosk | Yes | No | Proponent Comments |
| 1.1 | Proponent has Accessibility Conformance Report (ACR) available to demonstrate CMS/product accessibility conformance and current blockers. | | | |
| 1.2 | CMS supports adjustable accessibility settings for kiosk users, including adjustable text size, magnification, colour contrast/colour scheme selection. | | | |
| 1.3 | CMS can support or integrate with adjustable accessibility hardware settings for kiosk users (i.e. brightness, volume, touch latency). | | | |
| 1.4 | CMS supports compatibility with accessible peripherals or hardware connected to kiosk hardware, including keyboards, keypads, plug-in audio headphones, Bluetooth or hearing aids. | | | |
| 1.5 | CMS includes or supports accessibility features to facilitate usage by kiosk users with no vision and visitors with vision impairments. | | | |
| 1.6 | CMS is compatible with screen reader software, such as JAWS for Kiosk. | | | |
| 1.7 | CMS includes or supports text-to-speech functionality for kiosk visitors. | | | |
| 1.8 | CMS includes support of descriptive video or audio transcripts available alongside video and audio files on kiosk. | | | |
| 1.9 | CMS includes or supports accessibility features to allow usage by kiosk users without hearing and visitors with limited vision. | | | |

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| 1.10 | CMS supports usage of VTT files to provide bilingual closed captioning on videos. | | | |
| 1 | Accessibility - General/Kiosk | Yes | No | Proponent Comments |
| 1.11 | CMS includes options for video controls by app users, including play, pause, rewind and volume adjustment. | | | |
| 1.12 | CMS includes options for audio controls by app users, including play, pause, rewind and volume adjustment. | | | |
| 1.13 | CMS supports voice-to-text input for kiosk visitors. | | | |
| 1.14 | CMS supports addition of sign language interpretation to videos. | | | |
| 1.15 | CMS allows CMS users ability to add captions and alt text to images. | | | |
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| 2 | Accessibility App | Yes | No | Proponent Comments |
| 2.1 | CMS supports a way for museum visitors to access exhibit content on their own mobile device through their own control, whether via a progressive web app, mobile app or responsive web app. | | | |
| 2.2 | CMS supports location-specific app content via beacons. | | | |
| 2.3 | CMS supports location-specific app content via QR codes. | | | |
| 2.4 | CMS allows CMS users to create custom QR codes for accessing content on the app. | | | |
| 2.5 | CMS provides templates for an app-specific experience using exhibit content, such as additional details about exhibit content, an audio guide or scavenger hunt. | | | |
| 2.6 | CMS provides wayfinding capabilities for app users with no vision or with vision impairments | | | |

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| 2.7 | App is compatible with user device accessibility settings, including adjustable text size, magnification, screen brightness, colour contrast/colour scheme selection. | | | |
| 2 | Accessibility App | Yes | No | Proponent Comments |
| 2.8 | CMS includes or supports accessibility features to facilitate usage by app users with no vision and visitors with vision impairments. | | | |
| 2.9 | CMS is compatible with screen reader software on mobile devices | | | |
| 2.10 | CMS includes or supports text-to-speech functionality for app users. | | | |
| 2.11 | CMS includes support of descriptive video or audio transcripts available alongside video and audio files on app. | | | |
| 2.12 | CMS includes or supports accessibility features to allow usage by app users without hearing and visitors with limited vision. | | | |
| 2.13 | CMS supports usage of VTT files to provides bilingual closed captioning on app videos. | | | |
| 2.14 | CMS includes options for video controls by app users, including play, pause, rewind and volume adjustment. | | | |
| 2.15 | CMS includes options for audio controls by app users, including play, pause, rewind and volume adjustment. | | | |
| 2.16 | CMS supports voice-to-text input for app users. | | | |
| 2.17 | CMS supports, or allows integration of, augmented reality experiences. | | | |
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| 3 | Language support | | | |
| 3.1 | Supports bilingual content language switching (English, French) with ability for end user to switch into alternative language version from any screen. | | | |

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| 3.2 | Support additional languages (please indicate capabilities and limitation in comments) | | | |
| 4 | User Roles and Permissions | Yes | No | Proponent Comments |
| 4.1 | CMS support multiple user roles and permissions with varying levels of access and control. | | | |
| 4.2 | CMS provides capability for CMI to create and customize user roles and permissions to align with our organization's specific needs. | | | |
| 4.3 | CMS provides capability for CMI to assign different permissions (including ability to create, edit or view content) by individual screens, by screen grouping (i.e, by exhibition), and user roles. | | | |
| 4.4 | CMS provides ability for a user to have multiple roles. | | | |
| 4.5 | CMS provides ability for CMI super administrator to delete CMS users. | | | |
| 4.6 | Support for single sign-on (SSO). | | | |
| 5 | Support for a variety of screens and hardware | Yes | No | Proponent Comments |
| 5.1 | CMS supports display on kiosks, digital signage and screen endpoints of various sizes, configurations and brands, including tablets, large-format, tabletop, vertical display, wall projection. | | | |
| 5.2 | CMS supports kiosk experiences | | | |
| 5.3 | CMS includes pre-built templates for interactive touchscreen kiosks. | | | |
| 5.4 | CMS supports content management of multi-screen interactive or non-interactive walls. | | | |
| 5.5 | CMS includes pre-built templates for multi-screen interactive or non-interactive walls. | | | |

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| 5.6 | CMS supports content management of digital signage and non-interactive content. | | | |
| 5.7 | CMS includes pre-built templates for digital signage and non-interactive content. | | | |
| 6 | Support for a variety of interactions and experiences | Yes | No | Proponent Comments |
| 6.1 | CMS supports a range of content and assets, including images, documents, video, audio, 3D object scans, 360 content, animations. | | | |
| 6.2 | CMS supports a range of display and interactive approaches for kiosk content, including digital labels, tap-to-reveal, quizzes, drag-and-drop, and games. | | | |
| 6.3 | CMS includes customizable templates for a range of interactive kiosk content, including digital labels, tap-to-reveal, quizzes, drag-and-drop, and games. | | | |
| 6.4 | CMS supports quiz content with immediate feedback/scoring, including comparison with other visitor results. | | | |
| 6.5 | CMS supports creation of surveys for visitor feedback. | | | |
| 6.6 | CMS supports motion-sensor activated content in kiosk attract loops. | | | |
| 6.7 | CMS supports motion-controlled kiosk content. | | | |
| 6.8 | CMS supports visitor-generated content input (text, voice, content selection). | | | |
| 6.9 | CMS supports management of light display or interactions associated with exhibit. | | | |
| 7 | Content creation and management | Yes | No | Proponent Comments |
| 7.1 | CMS provides ability for CMS users to create, edit and manage templates, components and individual assets within exhibits. | | | |

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| 7.2 | CMS provides ability to upload external assets in batch, via drag and drop or otherwise. | | | |
| 7.3 | CMS includes a WYSIWYG editor for CMS users | | | |
| 7.4 | CMS provides inline editing capabilities for CMS users. | | | |
| 7 | Content creation and management | Yes | No | Proponent Comments |
| 7.5 | CMS provides ability for CMS users to preview content and content changes before publishing, including in both languages. | | | |
| 7.6 | CMS provides ability for CMS users to view full revision history of changes. | | | |
| 7.7 | CMS provides ability for CMS users to rollback changes. | | | |
| 7.8 | CMS provides ability for CMS user to add audio files such as narration, sound effects or music, to play concurrently with other app content (videos, images, interactive screen content). | | | |
| 7.9 | CMS provides ability for non-developer CMS users to create, manage and customize new templates independently. | | | |
| 7.10 | CMS provides ability for non-developer CMS users to create, manage and customize new exhibits/screens independently. | | | |
| 7.11 | CMS provides ability to categorize and organize content into logical zoning groups and exhibit-specific sections for easy management and retrieval. | | | |
| 7.12 | CMS provides ability for CMS user to schedule content updates | | | |
| 7.13 | CMS offers ability to add, create, format and edit all text content, including titles and headers. | | | |
| 7.14 | CMS offers rich text editing capabilities, including font styles, sizes, colours, bullet points and hyperlinks. | | | |

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| 7.15 | CMS provides ability for CMS users to edit images to meet exhibit needs, included resizing, cropping, and optimization. | | | |
| 7.16 | CMS provides ability for CMS users to set focal points for images. | | | |
| 7.17 | CMS provides ability for CMS user to manually select placeholder image for videos. | | | |
| 7.18 | CMS provides ability for CMS user to add and edit attract loops. | | | |
| 7 | Content creation and management | Yes | No | Proponent Comments |
| 7.19 | CMS supports use of videos in attract loops. | | | |
| 7.20 | CMS provides ability for CMS users to create, manage and schedule content playlists for different exhibits, screens, dates, times and durations. | | | |
| 7.21 | CMS provides ability to name and save digital signage playlists for future re-use. | | | |
| 7.22 | CMS provides ability to edit or manage user-generated content. | | | |
| 7.23 | CMS provides ability for non-developer users to create and customize workflows and approval processes. | | | |
| 7.24 | CMS can automate email notifications to CMS users as part of CMS workflows. | | | |
| 7.25 | CMS provides ability to mark fields as mandatory or optional for content authors | | | |
| 7.26 | CMS provides ability for A/B testing of exhibit or screen content. | | | |
| 8 | Digital Asset Management | | | |
| 8.1 | CMS supports the storage of rich media files (images, videos). | | | |
| 8.2 | CMS provides ability for CMS users to edit metadata of assets. | | | |
| 8.3 | CMS provides ability for CMS users to add, edit and manage metadata fields. | | | |

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| 8.4 | CMS provides ability for assets and their associated metadata to be exported from the CMS. | | | |
| 8.5 | CMS provides support for version control and management of assets. | | | |
| 8.6 | CMS provides the ability for CMS users to determine whether an asset in the CMS is currently in use for a live exhibit. | | | |
| 8 | Digital Asset Management | Yes | No | Proponent Comments |
| 8.7 | CMS provides the ability for CMS users to track when, and for what exhibitions, assets were used. | | | |
| 8.8 | CMS provides ability for digital assets to be referenced rather than stored within the CMS. | | | |
| 8.9 | CMS offers search capability for CMS users. | | | |
| 8.10 | CMS offers filtering of search results within the CMS. | | | |
| 9 | Technology | Yes | No | Proponent Comments |
| 9.1 | CMS offers browser-based access for CMS users. | | | |
| 9.2 | | | | |
| 9.3 | CMS is compatible with latest versions of Chrome, Safari, Microsoft Edge and Firefox. | | | |
| 9.4 | CMS allows interactives and screen content to continue to work uninterrupted if offline. | | | |
| 10 | Interoperability and integrations | Yes | No | Proponent Comments |
| 10.1 | CMS supports integration of assets from Argus Collections Management Software via a RESTful API. | | | |
| 10.2 | CMS supports integration of asset metadata from Argus using a RESTful API. | | | |

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| 10.3 | CMS supports two-way update synchronization of asset metadata using a RESTful API. | | | |
| 10.4 | CMS supports integration of content from Drupal CMS, including data about plaques and plaque location from database in Drupal. | | | |
| 10.5 | CMS supports exporting content to Drupal CMS. | | | |
| 10.6 | CMS supports integration with BrightSign CMS. | | | |
| 10.7 | CMS is compatible with displaying content on BrightSign media players. | | | |
| 10 | Interoperability and integrations | Yes | No | Proponent Comments |
| 10.8 | CMS supports export of form data which was input by kiosk visitors. | | | |
| 10.9 | CMS provides a headless option, or includes an API which can be used to integrate content to other platforms | | | |
| 10.10 | CMS supports embedded content from social media (CMI account or user-generated content), including Facebook, Instagram, X and TikTok. | | | |
| 10.11 | CMS supports embedded content from SoundCloud. | | | |
| 10.12 | CMS supports embedded content from YouTube. | | | |
| 10.13 | CMS supports embedded live feeds from YouTube, Facebook Live or other URLs. | | | |
| 10.14 | CMS provides ability to export experiences onto a USB for manual uploading and updates onto devices for full offline use. | | | |
| 11 | Security | Yes | No | Proponent Comments |
| 11.1 | CMS backups are run at least nightly by vendor. | | | |
| 11.2 | CMS allows for CMI to perform manual backups and exports of all data. | | | |

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| 11.3 | CMS vendor performs regular security audits and penetration testing on software. | | | |
| 12 | Data Analytics and Reporting | Yes | No | Proponent Comments |
| 12.1 | CMS provides capability to track data related to visitor engagement and content performance of interactives. | | | |
| 12.2 | CMS provides capability for CMI to customize data and events being tracked within each interactive experience. | | | |
| 12.3 | CMS provides a data and analytics dashboard for analyzing and presenting data related to visitor engagement and content performance. | | | |
| 12 | Data Analytics and Reporting | Yes | No | Proponent Comments |
| 12.4 | CMI can customize data and analytics dashboard within the CMS. | | | |
| 12.5 | CMS allows for the creation of custom reports tailored to CMI's specific reporting needs. | | | |
| 12.6 | CMS provides ability for CMI to analyze the number of visitors accessing each of the interactive kiosks. | | | |
| 12.7 | CMS provides ability for CMI to understand individual kiosk usage based on granular data such as date, time of day, etc. | | | |
| 12.8 | CMS provides ability for CMI to understand how long visitors spend on different experiences and specific screens. | | | |
| 12.9 | CMS provides ability for CMI to understand how visitors engage with exhibit content, including time on screen, screen views per visit, most popular screens and/or assets, navigation paths and drop off points. | | | |
| 12.10 | CMS provides ability for CMI to understand how visitors engage with exhibit content by language. | | | |
| 12.11 | CMS provides ability for CMI to compile visitor responses, scores or outcomes of interactive components and surveys. | | | |

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| 12.12 | CMS provides ability to generate heatmap or click tracking visualizations to identify areas of high visitor interaction and interest within kiosk interactives. | | | |
| 12.13 | CMS provides capability to generate heatmap visualizations to demonstrate visitor traffic and dwell times throughout the full museum space, such as via RFID integration or otherwise. | | | |
| 12.14 | CMS provides exporting options to download data in various formats, such as XML, CSV or Excel, for further analysis or integration with external tools. | | | |
| 12 | Data Analytics and Reporting | Yes | No | Proponent Comments |
| 12.15 | CMS provides API or other mechanism for integrating with external analytics tools. | | | |

End of Checklist.