

Scope of Work May 5, 2023

Member Portal

Prepared for CAFII

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Overview

At our core, Operatic is a creative digital agency that solves complex business challenges with data-inspired strategy. Our strengths include research, creative and digital strategy, performance marketing, web design including UX/CRO, and the development of websites/platforms/tools that better connect brands with their intended audience segments. We have a proven ability to produce deliverables that exceed our clients' expectations on time and on budget. To learn more about our approach and the value it drives for our clients, please [visit our website](#).

Objective

CAFI has identified a need to update their Member Portal. The current content management system (CMS), Drupal, is cumbersome for administrators and does not allow for easy, seamless updating. Additionally, there are brand inconsistencies that exist between CAFI's Member Portal and the consumer-facing website. Our objective in updating the Member Portal is to:

- Implement a user-friendly CMS platform, that is easier to manage and update
- Improve the user experience (look and feel)

To achieve this objective, Operatic recommends implementing WordPress (or similar) as the new CMS platform and retiring Drupal.

Requirements

WordPress (or similar) is not only the world's most popular CMS, but it is also user-friendly, easy to manage and update, and meets your criteria as outlined below:

- The ability to upload and post all the individual materials for each EOC and board meeting
- The ability to store historical documentation from each EOC and board meeting
- The ability to post and update 'Regulatory Updates'
- The ability to store and upload historical regulatory submissions (this will be implemented as a future project)
- The ability to navigate regulatory submissions and other documentation in an organized fashion such as:
 - chronologically (year, month, day)
 - by regulator and;
 - by topic (privacy, fair treatment of customers, IT reporting etc.)
- The ability to post and update the 'Weekly Digest'
- The ability to migrate all existing material (documents, etc) from the current Member Portal site into WordPress (or similar)
- Create brand consistency and improve the member experience

Member Portal

Foundation

Our WordPress (or similar) builds are future-friendly, leveraging advanced custom fields which allow you to easily edit existing pages and add new ones in the future.

There's truly no limit to what you can accomplish, and with peace of mind, because our WordPress (or similar) builds use best-in-class security measures to keep your Member Portal safe and secure. We follow WordPress



(or similar) best practices including modifying table prefixes, changing the default login URL, limiting login attempts and enabling two-factor authentication.

Features You'll Enjoy

- Consistent look and feel from the front end of the site
- Fully mobile-compatible design captures & retains mobile users
- Lightning fast speed delivers outstanding user experience and search engine optimization advantages
- Includes best practices for on-page search engine optimization enhancements
- Optimized for conversions
- Secured with leading-edge encryption
- Built with a platform that allows us to utilize a large ecosystem of integrations and apps
- Includes the page layouts and initial pages that you need to get started
- You're able to add as many additional pages as you want
- Comprehensive analytics dashboard shows progress towards KPIs
- Hosted and supported by our dedicated, in-house support team who knows you and your brand

WireFrame

Taxonomy is a reference to the general structure of your Member Portal, and the individual web pages that will exist within that structure. Information Architecture (IA) is in reference to the information provided on each one of those pages. The sitemap/wireframe is the overall picture of those two elements. We will rebuild the Member Portal using the existing taxonomy and will improve the IA based on user experience best practices.

Features & Functionality

Your Member Portal has been estimated to include the following specific features and functionality:

- Page Templates – Up to 6
- Total Pages – Up to 90 (EN/FR)
- Gated Portal
- Image Sliders
- Video Embed
- Map Embeds
- Contact Form
- AODA/WCAG Launch Compliant
- Site Search
- FR/EN Versions
- Blog-Style Pages

Member Portal Strategy & Design Process

Our efforts here will focus on creating an exceptional user experience and solid foundation for growth and will include:

- A kickoff meeting to finalize the taxonomy (navigation/pages)
- Outline of the information architecture (what content needs to be on which pages) in the form of a wireframe for your review and approval
- Design of the member homepage, a main navigation page and a sub navigation page for your review and feedback
 - One round of feedback implementation (please ensure feedback is consolidated)
 - Client approval

- Design of remaining pages for your review
 - One round of feedback implementation (please ensure feedback is consolidated)
 - Client approval

Content Requests

Our team of content experts will outline the copy needs of each individual page on your Member Portal and create the necessary content request documents to be shared with David Moorecroft who will write the copy.

Stock Images

In addition to the assets we receive from you, if any additional stock imagery is required, we'll purchase necessary imagery through our licenses on your behalf.

Responsive Design & Visibility Compliance

We'll ensure an optimal experience on mobile devices and that your Member Portal will comply with launch-level, applicable accessibility standards in Ontario (AODA) and in Canada (WCAG).

Upon completion of our designs and after the input of content, you'll have your final opportunity to share feedback. Once you've provided a comprehensive list of your final touches, we'll apply your feedback through one round of revisions as part of this scope.

Development

Our development approach is focused on bringing back-end platforms to life and delivering fast, responsive, secure and maintainable solutions. The following activities and deliverables comprise our development process:

- **Creation of functional layouts:** Consists of transforming the visual design produced in the design phase into functional HTML, CSS and Javascript-based templates.
- **Testing and quality assurance:** Includes cross-browser and cross-platform testing to ensure a high-quality experience across multiple browsers and devices.
- **Deployment to staging:** We'll deploy the finished product to staging for our final run through.
- **Deployment to production:** We'll ensure that the final and approved product will be successfully launched to your production environment.

Analytics & Tracking

Upon collaboratively defining the key performance indicators that you should measure on your Member Portal, we'll implement the following:

- Google Analytics (GA4 - newest version)
- Google Tag Manager
- 301 redirects of each of your old Member Portal pages to the appropriate pages on your new portal

Quick Reference Guide & Training:

Finally, we'll create a quick reference guide to assist you in understanding the CMS which your site uses, enabling you to make small tweaks quickly and easily, and we'll provide a up to 90 minute training session to get you acquainted with your Member Portal and guide.

Website Hosting & Maintenance

Our website hosting and maintenance plan incorporates several important components. It includes flowthrough fees related to the technical upkeep of the website, and proactive maintenance updates by the Operatic development team. The following are included:

- Hosting fee
- SSL certificate fee
- CDN fee
- Automated website backups
- Uptime monitoring
- Proactive CMS updates, which can include:
 - Plugin updates
 - Core updates
 - Application package updates

Project Governance

What About Feedback?

Feedback is an important part of our process, so addressing it needs to be a part of our workflow. Throughout our program (we'll need you to be especially active out of the gate), you will be given the opportunity to review and provide feedback before deliverables are implemented. We have included one round of revisions for all deliverables in this proposal. Should additional feedback be given after approval is received or one round of revisions is already completed, a Change of Scope Order will be required.

We ask that you do your best to be timely with your feedback so that we may keep your deliverables on time. We understand that from time to time unanticipated challenges arise which delay feedback from you. If this does occur, we'll communicate the effect of the delay on your project timeline.

Scope & Scope Changes

We're partners and as such will deliver what we've scoped in this document, whether or not we're on a budget. That said, from time to time new information, needs or wishes arise from our partners and it's important to note that anything that does not fall within this document is out of scope. When this occurs, our team will be diligent in ensuring that you're aware of the options you have available to you, as well as the pros and cons of each option. In cases where changes are determined to be necessary, a change request will be processed as follows:

- Operatic will create a Change of Scope Order that documents the relevant information, including but not limited to:
 - Description of the change
 - Rationale
 - Impact assessment
 - Effort
 - Associated incremental investment to implement the change
- This Change of Scope Order will be submitted to you and reviewed for final approval before we proceed.



Timeline

Upon signing of this scope we'll create a detailed timeline and will share it with you. This exercise can take up to 5 business days as we brief the team and assign the appropriate resources to support this project. Additionally, this effort will require some of your time and attention for reviews and approvals, and timely cooperation from you is necessary for us to stay on track.

Investment

Item	One-time	Monthly
Member Portal <ul style="list-style-type: none">• Strategy and Design• Stock Imagery• Content Requests• Development• Analytics and Tracking• Quick Reference Guide and Training	\$37,500	
Website Hosting & Maintenance		\$200
HST (13%)*	\$4,875	
TOTAL	\$42,375	\$2,712

Terms and Conditions

- *Investment is shown in CAD and includes HST.
- 1/3 of the investment due upon acceptance of this proposal
- 1/3 of the investment invoiced upon design sign-off
- 1/3 of the investment invoiced upon site launch
- Monthly hosting invoiced on the first of each month, beginning once the Member Portal has gone live.
- All invoices are net thirty (30).
- Operatic reserves the right to charge a late interest fee of 2.75% per month on invoices past due thirty (30) days.
- Accepted payment methods include cheque, EFT, and credit card. A 2.75% processing fee will apply to all credit card transactions.

Christy Cusack , VP Consumer Engagement
Sept 11, 2023

Signature of authorized representative
Date:

