



Responses to questions.

1. How many internal stakeholder groups are there to work with to discover overall business goals and objectives?

A project team (5 members) is the representative stakeholder group for this project.

2. Do you have a documented style guide or graphics standard to be followed?

Yes.

3. Will images/photos be provided or will we need to source them?

We will provide them.

4. Is there interest in staying with current conference platform if Single sign-on can be implemented?

We are open to that option.

5. Is there a need for searchable Member directory?

If this refers to an external searchable member directory, today we have not had one and I do not believe that is intended.

6. How many pages/articles and resources will need to be moved over for both cultures?

As part of this activity would involve a remapping exercise working out provide a concrete number, however anticipate that it would be fewer than on our current site. For everything that is moved, we would require both English and French cultures with the exception of small sections of the members only area.

See also question 12.

7. Do you have a preferred Content Management System (CMS) or technology preference?

No, our preferences for a functionality and sustainability

8. Can you expand or elaborate the form functionality required?

Current form functionality allows for the submission of queries to different identified email addresses. That is sufficient for the current operations of the site. If additional functionality is provided as part of the package, then the use of forms may extend accordingly.

See also question 17.



9. Is there an existing SEO strategy? Have you completed a Keyword analysis?
Keyword analysis has not been completed (or has not been completed recently)

10. Do you have a timeline in mind for the realisation of this project?
We do not have a specific timeline requirement

11. Having an idea of the anticipated budget helps us identify the best solutions within the scale of the mandate. We always try to keep costs at a minimum. Keeping in mind that we want to deliver the best value, can you provide us an idea of the estimated budget?

We have not provided an anticipated budget, and acknowledge that there are core requirements we will assess within budget, and scalable opportunities exist within the additional functionality identified in the RFP.

12. Is there more information about the scope of content in the member login area?

The member login area includes access restricted areas for committee documentation (9 areas) with one or more pages and links to uploaded content. There are an additional four areas of information (on page) and linked documents for all members to log in and view with one to three pages each.

See also question 6.

13. Regarding *Our members through member-only resource areas* How does someone become a member? Is there an online registration process or is this a manual process?

Members can apply to become a member on the membership portal. What follows is a mix of automated and manual processes.

14. If online, once someone completes a registration/membership request form, what happens? Are submissions reviewed manually, approved automatically, etc?

We receive an email informing us of the application, we login to the admin section of the membership portal and review / approve their membership application manually.

Once they are approved, new members are manually added to member access of the transfusion.ca website and provided with their login details.

15. Once someone is granted membership, are they able to do anything behind the login aside from viewing protected content and resources?

On the transfusion.ca website: viewing of member-only content.



On the membership portal: Members are able to update / change their profile, request a membership level change, change their passwords and renew their memberships.

16. Regarding *Secure and intuitive member access management with multiple permission / privilege structures to support additive or multiple areas of access. (Basic member, member + 1 or more committee pages, etc)*

With varying membership types or levels of access, do members simply have more or less access to similar type of content/resources, or are there additional privileges that are assigned to membership levels beyond what they can or can't see in terms of content?

Currently on the member area of transfusion.ca the only difference in member privileges is access to one or more areas of the member and committee areas. Individual members may have access to member only or any combination of member only and committee spaces.

Depending on any supplemental functionality agreed upon, this requirement may vary.

17. Regarding *Multiple contact, email signup, update forms* What platform do you currently use for email list management (in reference to the integration here)?

Currently Wild Apricot is used for email / member management.

A listserv is used to maintain a separate moderated email list that includes members and non-member participants.

There are currently several contact forms on the transfusion.ca website that direct the query to different email addresses, as appropriate.

See also question 8.

18. Regarding *Membership and contact management*

- *to payment, renewal for annual membership dues, including the ability to manage membership types, communicate with members and associate membership to website access levels.*
- *to capture, manage and communicate with non-member contact segment(s)*

Which payment gateway is currently use or preferred for use?

Currently the website is synced with Authorize.net but we are able to provide manual invoices through Square if needed.



19. What is the payment frequency? Are fees collected annually or are there alternative payment options (ex. monthly)?

Membership fees are paid annually, event registration is as needed or when event registration takes place, purchases to date are usually a one-time purchase.

20. Does the site need to send out automatic renewal reminds are preset time intervals leading up to the renewal date?

Yes

21. Are memberships renewed at the same time annually, or is renewal determined by specific dates that each member joined throughout the year?

They are currently the same time annually for all members.

22. What happens when a membership expires?

On the membership portal: They are moved into a pending renewal stated and provided with reminders to renew up to 90 days after the renewal date, they are then automatically put into a lapsed state and remain as a contact in the system until archived. Inactive lapsed members greater than 2 years become archived. On the transfusion.ca site: member access is manually deactivated and – after a period of non-renewal – deleted.

23. Can expired memberships be re-instated? If so, how?

Currently, yes, if they have not been archived, they can login to their account and renew their membership. If a member is unable to login, they can contact the office to manually reinstate their account and email their renewal invoice. Currently, if archived, they need to reapply for membership.

24. What are features or additional access is granted based on membership types?

Member only resources and education materials, including transfusion medicine standards. Identified members are provided further access to one or more committee member pages with resources and linked documentation that supports committee work.

Please also refer to question 16.

25. Regarding *Education registration/tracking for evergreen videos, presentations or integration with a learning management platform. Registration may be open to the public or members only. Which LMS is currently used or planned for use?*

Making use of currently available systems, Education Day events are now managed in Wild Apricot providing a record of registrants. Education Day takes place in Zoom where attendance reports are downloaded. Education Day is open to the general



public but Wild Apricot does have the capability to limit registration to members if need be.

We are open to reviewing recommendations.

26. Regarding *Moderated, interactive forum or discussion board*. Forums tend to have many different features and functions. Is there a general outline of what features and functions you would like to offer users?

We are open to reviewing recommendations and capabilities of available platforms. Members would be coming to this from an email list that currently provides topic-based email response threads with limited numbers of attachments.

27. Regarding *Conference and event management including registration, abstract management, session selection, conference resources and an associated attendee app experience OR appropriate streamlined alignment with CSTM's existing conference platform (Dryfta)*. Do you require the ability to collect fees during the registration process?

Yes. Fees are collected for registrations - registration costs vary depending on which days they are attending, social events they are attending and whether they are a member, non-member, student/retiree, speaker etc. Currently managed by creating multiple tickets for purchase and applying the appropriate discount code at checkout.

28. Do you need to manage inventory/availability for events? For example, only 100 seats are available for Event X, and registration needs to automatically shut-off after 100 registrations?

Capping registrations is a limitation of our current registration system for education sessions that we would be open to exploring.

For the conference we usually only need to cap registration for the President's reception depending on venue capacity. We would not use a waitlist for this.

29. Do you need waitlist functionality for events that have overflow?

We would be open to reviewing the available options.