Request for proposals: Usability Experience study centred on the Fitzwilliam Museum's Beta website and collection

Background

The Fitzwilliam Museum aims to:

- Touch people's lives by engaging powerfully, thoughtfully and pleasurably with as wide a public as possible;
- Produce and promote innovative, relevant, and interdisciplinary research of the highest quality around our collection.

The Fitzwilliam Museum is widely considered the world's outstanding university art collection. We care for works of art and material culture from Europe, Egypt and Asia of exceptional international importance, works that connect people across cultures and time. Founded in 1816 *'for the increase of learning'*, the Fitzwilliam has long been both a great public cultural asset and an extraordinary scholarly resource – local, regional, national and global.

Since the Covid 19 lockdown was imposed in March 2020, the Fitzwilliam Museum's team (FM) have been working under the banner of FitzVirtual (FV) and a suite of products and projects have started. This is a project to transform the Museum's digital presence to meet the needs of the current moment and work towards creating a distinctive, sector-leading digital museum experience for the future.

These include:

- A beta website
- A beta collections interface
- A podcasting project
- A Virtual Learning Environment project
- Ticketing and Memberships
- Internal communication methods

The principal guiding tenet behind these projects are the concepts of co-production and user centred design (we have been harnessing crowdsourced data for instance to enrich existing content), and we are now at the point where we need to begin the process of responding and implementing user feedback and improving our 'customer experience' for our diverse audiences.

The design, build and implementation of the beta products has been entirely in house using standardised software libraries and principles driven by the use of Application Programming Interfaces (API), whilst the ticketing/membership project uses the sector leading Tessitura TNEW system.

The FM has over 10,000 pages of non-collections data on over 30 different websites, and over 400,000 pages of collections data. The FV project has been working to revamp,

revitalise and integrate these disparate pages into a new presence, whilst also auditing, revising and evaluating current work.

Purpose and scope

This usability experience (UX) study will be focused on three digital elements of this project - the two beta products and ticketing platform and how these work together. It is principally aimed at the functionality of the products, and we are aware that the design elements will need refining.

We are now requesting proposals for approximately 5 days work for a contractor (individual or company) to implement this study for a fee of **£2500** (inclusive of VAT) with the work to be completed by end of December 2020.

Fundamental research questions.

It is expected that this study will collect qualitative and quantitative data to answer several research questions, including:

1. Task completion: How well does the site support our audiences' ability to accomplish key goals and tasks?
2. Information architecture and navigation: For example, does the site structure support our audiences' ability to accomplish their tasks? Can they navigate to where they want to go and accomplish their tasks quickly and efficiently? What pathways do they take?
3. Homepage: Does it convey the spirit of the FM's mission and provide ready access to the key pillars of discovery for our visitors?
4. Terminology: Do our audiences understand the jargon and museum language we employ?
5. Content: Do our audiences find the content engaging, informative and easy to understand?
6. Conversion: Do the platforms aid our audiences to convert their visit to commercial action (shop product, donating, purchasing memberships or booking tickets)?
7. Layout and visual design: How do our audiences feel about the beta and ticketing sites' aesthetics in relation to the old presence? Are we presenting change well?

What do we expect?

For this study we are expecting to see within your proposal:

- A proposal for a series of at least 3 virtual workshops with representative users (including our staff from all levels of the hierarchy) of our resources, who will try to perform realistic tasks to be co-defined by you and the FitzVirtual team which will lead to the collection of empirical data.
- A detailed description of the tasks to be performed by panel members during the workshops.
- An overview of the number of participants you wish to include, including how you will address diversity and digital literacy.

- A written report, followed by a virtual presentation to our key teams (FitzVirtual, Directorate, Marketing and Comms, Digital and IT)

From the above two activities we expect to be furnished with:

- Derived behavioral observations and insights into the current user experience
- Actionable insights centred on design solutions on how to improve, strengthen and enrich the experience for our audiences
- Actionable baseline information on the current experience that can be used as a comparison for future online experiences, from which measurable metrics can be used to signal successful implementation of your suggestions.

Key resources

For this study to be accurately responded to, the below is a list of the key resources that will inform your thinking:

- The current FM website: https://fitzmuseum.cam.ac.uk
- The beta FM website : https://beta.fitz.ms
- The beta FM collection interface: https://collection.beta.fitz.ms
- The FM beta pattern HTML library: https://patterns.fitz.ms
- The tickets and membership website: https://tickets.museums.cam.ac.uk
- The TNEW template site: https://fitzwilliammuseum.github.io/tessitura-fitz
- The University of Cambridge Museums site: https://museums.cam.ac.uk
- Github profile: https://github.com/fitzwilliammuseum

The Github profile holds the code for the front and back end of our collections and website project, front end for TNEW, and our patterns library for design implementation. You will be able to test these out for yourself by following the 'readme' instructions. Our default position is to code in the 'open' for reproducibility.

Internal support available

The FM can provide:

- Logistical support to set up the usability study virtual workshops on Zoom, Microsoft Teams or Google Meet.
- The Head of Learning will provide the FitzVirtual point of contact.
- The Head of Digital will provide the technical point of contact.
- Assistance recruiting volunteers for study.
- Access to internal content audit.
- Access to Google Analytics data.
- Access to statistics from Tessitura (confidential)
- Access to Google Search Console.

Incentives for users participating in the study

The FM team is currently investigating the provision of fiscal incentives in the form of vouchers for participants in the study. The value of these would not be part of the fee.

The technology stack we employ

The FM is principally focused on Open Source technologies to enable replication by others and for sustainability amongst our very small Digital & IT staff. We employ a variety of technologies in our projects, mainly focused on keeping things simple, documented and easily transferable.

These encompass:

- Amazon Web Services for hosting dynamic scripted websites
- Github Pages for static HTML generated sites
- Directus Headless CMS for content and images delivered by simple REST API
- Knowledge Integration's CIIM platform for delivery of Collections information (ElasticSearch REST API)
- ElasticSearch and Solr for search engine and content dissemination including suggested content and aggregation of disparate content
- Laravel 7 & 8 with the Blade templating engine
- REDIS for front and back end cache
- Bootstrap 4.5 & JQuery latest iteration for front end framework
- Github for source code version control
- Jekyll for static website generation
- Tessitura for ticketing and memberships (TNEW front end)
- A variety of CMS installations:
  - Wordpress
  - Craft
  - QI
  - Drupal

Our teams

The teams that have worked together on these projects include:

- Digital and IT
- Learning
- Marketing and Communications
- Development (fundraising in this case - not IT focused)
- Curatorial staff
- Directorate (influencing and decision making)
- FitzVirtual Steering Committee
- External experts and contractors

Reporting structure

- This opportunity will have a matrix reporting structure between the Head of Digital and IT, Head of Learning and Acting Deputy Director for Collections.
- The consultancy will interact with members of staff from the collections, learning and digital teams.
- The supplier will not manage or instruct any university staff and not be considered part of any staff team
- The supplier will provide their own equipment, but may be issued with a restricted university identifier to access resources within the museum and university network.

Confidentiality

The appointed contractor will be furnished with some confidential information and this will be indicated at the point of data transfer. There will be no bar on them presenting methodology and findings at museum or digital conferences.

Expressions of interest

To express an interest, please send a CV, your proposed activity plan in response to the brief above, covering letter, portfolio of work and a list of proposed individual or team members, to Miranda Stearn (mrrs2@cam.ac.uk) and Daniel Pett (dejp3@cam.ac.uk) by 5pm 02/11/2020

The Museum's Finance Department will conduct financial checks for tax clearance purposes.

Selection criteria

The scoring matrix below will be applied by the FitzVirtual team, who will be selecting the contractor. Feedback will be provided to all candidates shortlisted.

Evaluation Criteria	Possible score
Technical criteria	
Methodology proposed	**30**
Portfolio analysis	**10**
Clarity of proposal for non technical staff	**10**
Experience of contractor	
Quality of previous clients	**10**
Proposed team makeup	**10**
Costing	
Proposed cost breakdown	**10**