January 2018

Brief to create a new website for the People's History Museum (PHM)

Background

People's History Museum is the national museum of democracy and the home of ideas worth fighting for. The museum is in the second year of its 2016-2020 Business Plan which will transform the museum to be the 'go to' place for democratic engagement for the UK.

A national museum with a home in Manchester, we want to ensure we are known by people from all over the UK, and the world, and are relevant to their lives. We already have the amazing collections, unique stories, big ideas, passion and commitment and now is the time for our museum to step up, take the lead, reach further and achieve more. We are confident and ambitious for the future and we are committed to engaging many more people in the work of the museum as audiences, partners and customers.

We are an ambitious museum and proud to have been recently announced as a new ACE NPO. The NPO funding, which runs from April 2018 to March 2022, will place PHM alongside some of the leading arts organisations in the world.

We want to be a truly accessible organisation and ensure that we reach audiences that are represented in our collections, and in doing so encourage greater democratic engagement within society. Our aim for the coming years is to increase our engagement with partners and audiences by offering them an expanding range of opportunities to be involved and contribute.

Developing our digital literacy and ambition as an organisation is a crucial focus for the next four years. Our current website is eight years old and offers very limited services for visitors and whilst we have a strong social media presence on a number of channels these are not currently linked to an audience development strategy. We are not focussed on creating digital content or access to our collections and think there are opportunities to engage with audiences in this way.

Website brief:

Our key requirements include:
- Supporting our ambition to become a campaigning organisation with the use of digital to develop relationships and deepen engagement.
- Integration with Campaign Monitor, Eventbrite, our SMX™ Patron Customer Relationship Management (CRM) system, our KeEMU Collections Management System (KeEMU CMS) and our yet-to be procured Digital Asset Management System (DAMS).
- Creation of and integration with a mobile version of the website
- The ability to support our changing events programme, event marketing (Campaign Monitor), ticketing (Eventbrite), e-commerce, donations and membership strands; a corporate section/site; planning a visit; specialised tools for researchers and others interested in exploring our collections; and any related media and content.
- Making the most of open source and free software, avoiding dependency on proprietary technology.
- Training workshop and material for key staff to cascade to the wider team.
- A platform that can be easily managed and updated by our staff with little need for technical support.
- Universal accessibility.

Ways of working:
We want our chosen agency to work with us in an agile way to secure the best return on our investment, minimise risks and work collaboratively with our teams. We would welcome suggestions on how to best deliver this and the digital tools that may support an agile approach.

There will be a dedicated Technical Project Manager at PHM who will co-ordinate the website build alongside an ongoing deployment of the CRM and improvement to the KeEMU CMS.

Technologies:
We want to make the most of open source and free software, and freely or inexpensively available online services. If we can borrow or buy in without creating an unacceptable dependency, we would rather do this than build.

We want to use commonly used technologies so that we can easily source people and partner organisations to work on our digital platforms, and so our platforms can evolve over time and integrate with latest state of the art innovations.

We do not wish to be tied into proprietary solutions unique to a single supplier or which have a limited ecosystem of expertise around them – or where they risk not evolving rapidly with the market.

Flexibility and resilience:
We require a platform that can be managed and updated by our in-house team.
It must cope with peak traffic volumes to the site and the increase of traffic over time.
It should ensure smooth and effective integration with Campaign Monitor, Eventbrite, our SMX™ Patron CRM, our KeEMU CMS and our yet to be procured DAMS including incorporation of ongoing development, software and hardware updates.

The platform needs to be supported 24/7 and out of standard office hours. It must be flexible and resilient in the face of future developments in technology, user expectations and our needs.

It must be hosted on a secure system, in line with PCI and GDPR requirements.

Event marketing and ticketing:
The integration between the website and our other digital platforms needs to be seamless. Users should not perceive that they have moved between systems, whether they are researching a visit, making donations, or interacting with content.

Within the booking process there should be content that supports their decisions and encourages them to look at other services offered by the museum. For example, people planning a visit to the museum should be encouraged to join the new mass membership programme (and receive e-newsletters), be made aware of public events and the learning programme or enabled to consume content from previous events.

The platforms should provide end-to-end tracking of user engagement, including the source of increased traffic, resulting dwell time and sales conversions.

E-commerce:
We already support some ad-hoc mail order of items in our shop and we will be investigating the feasibility of offering an e-commerce function on our site, with APIs that enable us to sell our inventory in other suitable third party e-commerce destinations.
E-commerce should support m-commerce as well as credit card payments.

Donations:
We want to make it easy for people using our site to make donations from within user journeys to optimise our revenues. Examples include making a donation after signing up to Join the Radicals tiered membership scheme, while finding out how to visit the museum, while browsing our collection, while buying tickets for an event, or while consuming content

that is entertaining or which demonstrates how we deliver our social, cultural and educational objectives.

Planning visits:
People may be visiting PHM to see our collection, or they may be popping in to use The Left Bank cafe bar, or be visiting the building as a heritage visitor attraction. We should be helping them make their experience as easy and rich as possible. So help with travel and finding their way are in scope – as are other cultural, entertainment and leisure (e.g. shopping, eating/drinking) activities. We should be exploiting the potential revenue opportunities from such affiliate referrals.

Corporate section/site:
This needs to fulfil statutory requirements (registered office, privacy policies etc.). But it is also the public face to funders, commercial sponsors and partners, policymakers and politicians and other stakeholders.

Universal accessibility for all ages and all abilities:
We take pride in the diversity of our audiences and users. Our digital supplier should understand this diversity of needs and approaches, and have a strong interest in pursuing universal accessibility beyond compliance with basic accessibility standards.[1]

We should not assume that our core users are predominantly digital natives and/or use the latest technology. Our digital offerings must be inclusive of people using different generation devices/programmes/browsers or those with limited broadband, and user friendly for anyone who is temporarily disabled and unused to access technology.

The site must use a responsive design that natively adapts to different screen sizes and to a mobile version of the website as necessary.

Detailed Requirements:
1. General Principles:
   a. The budget for PHM's new website is c.£20,000
   b. PHM's new website should be built following agile methodology
   c. The website architecture, design, features and functions should be further defined by user testing
   d. The minimal viable product must launch by Friday 1 June 2018 to coincide with the opening of PHM's *Represent! Voices 100 Years On* exhibition
   e. The website must evolve over time as user needs and PHM's requirements change
   f. The website should follow the following guidelines in order of priority:
      i. W3C: https://www.w3.org/standards/
      ii. gov.uk: https://insidegovuk.blog.gov.uk/gov-uk-standards-and-guidelines/
      iii. BBC: http://www.bbc.co.uk/guidelines/futuremedia/
   g. The website and its content should be published under an Open Government Licence except where the licensing of individual assets prevents this

2. User needs: These should be further tested before being confirmed. Visitors should be able to easily:
   a. Find out information about how to travel to PHM
   b. Find out information about events at PHM and buy/book tickets
   c. Sign up to become a new mass member of PHM (to receive e-newsletters)
   d. Follow PHM social media accounts either on the website or by clicking through
   e. Donate money to PHM
   f. Sign up to Join the Radicals membership scheme
   g. Access articles, photos, video and audio content published by PHM
   h. Search or browse digital assets held by PHM
   i. Search or browse physical objects and archival documents held by PHM
   j. Consume content contained in PHM gallery interactives

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[1] For example, BBC Future Media Standards and Guidelines: http://www.bbc.co.uk/guidelines/futuremedia/accessibility/html/

k. Find out more about the Labour History Archive & Study Centre and how to book an appointment
l. Find out more about PHM's Learning Programme and how to book a session
m. Find out more about PHM's Venue Hire service and how to book spaces for events
n. Find out how to contact PHM and a desired member of PHM staff
o. Find out information about The Left Bank cafe bar
p. Purchase items from PHM shop (the online shop must have APIs that enable shop stock to be purchased from external retail channels)
q. Find out more information about PHM commercial services (research, licensing, conservation etc)

3. Content Management and Site Editing, Updates and Administration:
   a. Content on the website will be published and maintained by PHM staff
   b. There must be a simple and intuitive content management system
   c. PHM staff should easily be able to edit existing pages
   d. PHM staff should easily be able to add new pages within the existing website architecture
   e. PHM staff should easily be able to publish new multimedia content

4. Sitemap and Navigation:
   a. The structure of the website should be kept as simple as possible
   b. The website navigation must be simple and intuitive
   c. The structure of the website should focus on content identified as the most useful in user testing

5. Tracking. The website should easily allow PHM to monitor its performance:
   a. The website should have a performance dashboard that is viewable by PHM staff publishing the following data:
      i. Traffic to the site
         1. Unique visits
         2. Repeat visits
         3. Pages viewed
         4. Number of pages used per session
         5. Session duration
      ii. Sources of traffic
         1. Traffic coming via search engines
         2. Traffic referred from another website
         3. Traffic from typing the domain into the browser
         4. Traffic from social media
      iii. Bounce rate
      iv. Exit rate
      v. Most popular pages or sections
      vi. Conversion rate
         1. Sign ups to new mass membership (e-newsletter)
         2. Follows on social media
         3. Shop sales
         4. Sign ups to Join the Radicals
      vii. Conversion by traffic source
      viii. Website speed
         1. How quickly pages are served to users
         2. How quickly users interact with the site
      ix. All available data from PHM social media sites

6. Search Engine Optimisation:
   a. The website will conform to latest best practice search engine optimisation and must be updated as search engine requirements update
   b. The website will optimise keywords and search queries

7. Accessibility:
    a. The website must conform to W3C standards for accessibility

8. Styling and Design:
    a. The website design must follow existing PHM branding
    b. The website design must be simple, clear and up to date
    c. The website must follow a responsive design that resizes to accommodate different screen sizes
    d. The website navigation must be simple and clear
    e. The website must follow gov.uk guidelines for browser support

9. Security:
    a. The website must be GDPR compliant
    b. The website must follow UK and EU regulations on privacy
    c. The website must follow Electronic Frontier Foundation best practice on privacy
    d. The website should explicitly tell users what cookies and other code it is using and leaving in their browsers
    e. The website must have an SSL certificate

10. Hosting:
    a. The website must be built on a scalable and flexible technology platform such as Wordpress
    b. It must be possible to upgrade the website as the platform technology is updated
    c. The website must integrate with Campaign Monitor, Eventbrite, the SMX™ Patron CRM, KeEMU CMS, and future DMAS system
    d. The website must support segmentation of audiences
    e. The website should be hosted by a third party on servers in the cloud
    f. The website must have 99.9999999% uptime

11. Maintenance and Support:
    a. The website must be backed up on a regular basis (frequency to be agreed) to ensure restoration of content, data and system
    b. It must be possible to quickly restore the website from a backup
    c. The website host must apply security patches and feature upgrades within an acceptable timeframe
    d. The website must have a security suite including firewall and vulnerability scanning
    e. The website should have 24/7 monitoring showing uptime and service resilience
    f. The website provider must provide support via phone, email and live chat with at least one of those channels available 24/7

12. Exclusions:
    a. The website upgrade project will not cover the rollout of the SMX™ Patron CRM
    b. The website upgrade project will not cover PHM social media channels
    c. The website upgrade project will not cover PHM gallery interactives

Timetable
- Closing date for applications is midnight on Thursday 15 February 2018
- The Director, Communications & Marketing Manager and Marketing & Development Officer will shortlist candidates and will interview the project lead on Thursday 22 or Friday 23 February 2018
- The work should ideally begin by Thursday 1 March 2018
- The minimal viable product must launch by Friday 1 June 2018

Proposal

Your proposal should include:

1. Credentials for the agency and all who will have input into the work
2. Details of previous relevant websites undertaken with references for each
3. A methodology of how you propose to meet the requirements of the brief
4. A programme indicating how you would deliver the project and key dates for tasks
5. A costing breakdown

Your proposal should be returned by email to marketing@phm.org.uk by midnight on **Thursday 15 February 2018**.

For an informal chat please contact Paula or Daisy on 0161 838 9190.