

**REQUEST FOR EXPRESSION OF INTEREST FOR
SELECTION OF DESIGN CONSULTING FIRM**

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Project Information

- **Project Title:** OSGeo Branding, Website and Marketing Collateral Project
- **Expression of Interest Deadline:** January 20th 2017 11:59pm UTC
- **Funding Source:** OSGeo 2017 Budget
- **Individual/Firm:** This consultant will be a firm
- **Not to Exceed Amount:** \$30,000 USD
- **Project Timeline:** Site live August 1st 2017, Project Complete August 31st 2017

Project Description

Introduction

The Open Source Geospatial Foundation (OSGeo) wishes to update and enhance its organizational branding and online presence and seeks qualified firms to provide design services in order to accomplish those objectives.

Background

The Open Source Geospatial Foundation (OSGeo) is a not-for-profit organization whose mission is to foster global adoption of open geospatial technology by being an inclusive software foundation devoted to an open philosophy and participatory community driven development.

The foundation provides financial, organizational and legal support to the broader open source geospatial community. It also serves as an independent legal entity to which community members can contribute code, funding and other resources, secure in the knowledge that their contributions will be maintained for public benefit. OSGeo also serves as an outreach and advocacy organization for the open source geospatial community, and provides a common forum and shared infrastructure for improving cross-project collaboration.

The foundation's projects are all freely available and useable under an Open Source Initiative certified open source license.

OSGeo has US 501(c)(4) legal status as a not-for-profit organization.

OSGeo's Mission Statement is to "Foster global adoption of open geospatial technology by being an inclusive software foundation devoted to an open philosophy and participatory community driven development."

The following aspirational goals support the overall mission. As a foundation we seek to:

- (external objectives)
 - foster the use of open source geospatial software;



- encourage interoperability with open and community standards;
- champion the use of open-source and community participation through the development of an open education curriculum
- champion community building
 - through horizontal (local chapters) engagement; and
 - through vertical (sector specific) agreements with like-minded organizations;
- be a welcoming and inclusive worldwide organization at all levels;
- (internal objectives)
 - provide resources for foundation projects;
 - ensure interoperability between the foundation projects;
 - encourage a high degree of quality and innovation in foundation projects;
 - enable communication and cooperation amongst OSGeo communities;
 - celebrate excellence, openness and service within the OSGeo community.

Key Initiatives

Geo for All

"Geo for All" is the Open Source Geospatial Foundation's Committee for Educational outreach and works in close collaboration with ICA, ISPRS, UN-GIS and other partners worldwide in our mission for making geospatial education and opportunities accessible to all. Dozens of Geo for All labs have been established worldwide.

FOSS4G

FOSS4G is the acronym for Free and Open Source Software for Geospatial. It is the annual recurring global event hosted by OSGeo since its inception in 2006. Its predecessors were rooted in the GRASS and MapServer communities and can be traced back to the beginning of this millennium. Developers and users from all over the world gather to present their work and work collaboratively on new features or developing shared roadmaps.

Incubator

The OSGeo Incubator is an outreach effort to welcome new projects into our foundation. As an outreach effort incubation is designed to promote open source and inclusive development of software projects.

Local Chapters

OSGeo local chapters provide a venue to support local users and developers, as well as a mechanism to further OSGeo's mission and goals in a linguistic, or geographic area



Project Objectives

The overarching objectives of this project are to redesign and reorganize OSGeo's organizational branding and create a new online, interactive community platform, website and marketing collateral in order to:

1. Enable users new to the OSGeo ecosystem to easily Explore and Discover an appropriate OSGeo software project for their own needs and to connect with its user and developer communities.
2. Enable better understanding of OSGeo projects and presence.
3. Facilitate OSGeo's ability to advance and expand open source geospatial user and developer communities.
4. Increase capacity of local osgeo chapters (including Geo for All labs) to develop strong and accessible presence for growing their community.

Currently, OSGeo has a website at <http://osgeo.org> based on the Drupal Platform (version 5.23). OSGeo also maintains <http://foss4g.org> and <http://geoforall.org/> which is used for the foundations annual conference and education initiatives. There are also several sub-domains for various initiatives and projects. Several OSGeo projects and local chapters host their public facing website on OSGeo's servers, while others are hosted separately. These are listed in Annex II.

The objectives to 'Enable users new to the OSGeo ecosystem to easily Explore and Discover an appropriate OSGeo software project for their own needs and to connect with its user and developer communities.' and 'enable better understanding of OSGeo projects and presence' entails:

- Provide a user friendly guide to OSGeo projects based on their intended use and capabilities that is attuned to the various roles involved in the software lifecycle (users, administrators, developers etc)
- Allow users to 'Discover' an OSGeo project appropriate for their needs buy providing a 'Guided Search' based on their stated role(s).
- Clearly 'Explain' the role of each OSGeo project within the larger realm of GIS software with simple and easy to understand graphical content.
- Provide clear and simple instructions for each project or chapter's community resources (downloads, mailing lists, communications channels, issue trackers etc) and guidance on how to join the various communities.
- Create a collection of relevant project details, case studies, and blog posts accessible from the project 'Discovery' interface or by using the resource catalogue.
- Provide a user friendly interface accessible for people with varying levels of proficiency with web technologies and English
- Provide the ability for OSGeo stakeholders to easily translate the content of the site into their own language and for users to switch to their language if available.



The objective to 'Facilitate OSGeo's ability to advance and expand global open source geospatial communities' entails:

- Enabling growth and sharing of 'best practices' through online resources, such as the Geo for All Initiative, the Incubator and by showcasing local Case Studies.
- Streamline the presentation of existing projects, initiatives, chapters and available tools as well as local case studies through a resource catalogue page.
- Provide clear and simple explanations of OSGeo's initiatives (Local Chapters, Geo for All, UNGIS, Incubator etc) and how to participate in them. (The complete list of these initiatives can be found in Annex II)
- Provide a Global Event Calendar that is easy to contribute to and easy for users to find relevant events in their area and to connect with other user via social media channels.
- Provide a clear path for local organizations and projects who wish to host their site separately or use social media groups or channels for organization to include their details in the main website and to include their content where appropriate.

The objective to 'Increase capacity of local osgeo chapters to develop strong and accessible presence for growing their community' entails:

- Display a map populated with existing and 'in formation' local chapters as well as Geo for All labs. (see <https://opendri.org/project/>) that links to resources about these entities.
- Encourage partnerships and OSGeo involvement by showcasing goals, objectives, and project potential.
- Provide support and guidance for how to systematically approach setting up a web presence for a new local organization or project using OSGeo as a parent site and adhering to the overall brand guidelines.

The selected firm will provide support and guidance to help OSGeo populate the new platform with the initial content that will be available at site launch and the skills required for future updates.

Project Components

Component 1: Branding and Online Style Guide

This activity includes the firm developing OSGeo branding by creating a logo and style guide as outlined below. Logo's and branding will developed for 'sub-brands' under OSGeo (Geo for All, Incubator etc) in a consistent and structured manner. This activity will build off off existing materials that will be provided to the firm (see <http://cartogenic.com/OSGeo-brand/guide/>). These include: a) a few logo options with feedback from OSGeo stakeholders-(see below); b) templates for brochures; c) icons.



Logo

OSGeo is seeking a simple, eye-catching, and versatile graphical logo and brand design system to use on the online platform as well as across publications, presentations, and other branded output including use by local organizations and projects affiliated with OSGeo. The existing OSGeo logo has established recognition and brand history and the new logo and graphical system should be an evolution of this logo and existing branding rather than a complete reimagination. The firm is expected to provide at least 5 logo and sub logo options and two design consultation meetings and further iterations to finalize chosen option.

Style Guide

This activity includes developing a Corporate Style Guide for use by OSGeo and its sub-brands initiatives and projects which provides a coherent brand system that can be used to ensure a consistent presence for OSGeo across print, online and social media.

Elements to be included in the style guide are:

- Design Values
- Logo and usage
- Logo variations for Sub-brands, initiatives and projects logo usage (see Annex II)
- Font and typography options
- Color palette
- Publications template (See Component III)
- Poster and Banner template (See Component III)
- Brochure and Marketing Collateral templates (See Component III)
- Presentation template (See Component III)
 - Includes key slides illustrating schematic representation of OSGeo projects, initiatives and activities as outlined in the “About” section of this document
- Icons & Symbols
 - The icons and symbols are representative of the programs and initiatives of OSGeo (see OpenDRI principles here <https://opendri.org/about/>)

Component 2: Online platform development, content and maintenance

Vision for the online community platform

The new online platform will serve as an index and starting point of discovery for various content related to OSGeo projects, initiatives, activities and local organizations with information related to each entity such as blogs posts, best practices guides, community resources and social media linked in a clear and accessible way. The osgeo.org website will be a place for users to discover which OSGeo projects are appropriate for their needs, to find collected knowledge about those projects and facilitate engagement with their communities. Various OSGeo stakeholders will be responsible for adding and maintaining content on this site as well as



linking it for interaction with their local or technical community via social media and external sites.

Annex I details required components for the platform. This list is not all-inclusive and is subject to change depending on the outcomes of the consultation. This platform is required to be completely responsive (working on current mobile platforms).

Content Management System

~~Jekyll Collections will be used to manage content on the site and the site will be deployed using GitHub pages. All static media will also be hosted using GitHub pages, and styles will be built using SASS style sheets and compiled automatically by GitHub pages. Markdown format will be used by OSGeo members to edit content directly on github.com or via an external git based tool. OSGeo members will be responsible for content creation and curation after the initial migration. Jekyll plugins may be used to allow for the use of additional capabilities.~~

Content integration

The activities under this project will include the integration of various content that currently exists in web pages, wikis, documents, presentations and data visualizations onto the new online platform so that the users can access the information in a more usable and manageable way and to allow for easier content editing workflow for the various OSGeo Stakeholders. OSGeo will provide the consultant with the list of materials that exist and that need to be integrated as well as various stakeholder groups that will participate in maintaining content.

The initial template creation, content uploading and integration of the content itself will be the firm's responsibility. Demonstrating and training OSGeo stakeholders on how to upload and migrate content to new site will be required so that OSGeo stakeholders can take over the maintenance of the website.

Features and functionalities

- ~~Content Management System Based on Jekyll Collections using Markdown deployed on GitHub pages.~~
- Design and Branding configured to align with OSGeo branding developed as part of Component 1
- Stylesheets based on sass or less
- Fully Responsive Design
- Cross Browser Compatibility for the latest version of Chrome, Safari, Firefox, and Internet Explorer 9+
- Responsive Navigation and Information Architecture (below is a preliminary IA)
 - Home (Map)
 - About
 - Projects (linked to Case studies, other example maps and data)
 - Initiatives



- Guides (Interactive project or topic guides)
- Resources (Documents, PDFs, external sites and events) ○ Blog/News
- Local Organizations/Chapters/Labs
- For Developers (technical resources for working with OSGeo Projects)
- Flexible, Robust and Responsive Page Templates using configured as content types in the CMS
- Collections: The following collections will be included:
 - Generic content pages (About Us, etc.)
 - Resources (Documents, PDFs, external sites and events with a summary/abstract)
 - Technical Resources (svn, git, wiki, trac etc)
 - News/Press Release/Other timely coverage
 - Case Studies
 - Projects
 - Local Organizations
 - Initiatives
 - Committees
 - Events
 - Galleries
 - Contributors (Users, Developers, Sponsors etc)
- Categories/Taxonomies for Searchable Content Organization for Resources, Projects Posts or Region
 - Topic/Issue/Project
 - Location (Region, City)
 - Free Form “Tagging”
 - Search
- Social Network Sharing & Integration with social media feeds/groups etc
- Newsletter subscription
- Analytics (Google and other)

Hosting

~~This site will be hosted on GitHub pages and updated using a git based workflow or direct editing in the github.com browser. The repository is to be public and write access controlled through Github group permissions in the osgeo organization. No external software or services are required beyond GitHub.~~

Mobile capability

The site will be built using a completely responsive set of templates. The information architecture phase will determine the organization of the mobile content. The site will be tested with standard and alternative browsers on the latest 2 major revisions of iOS and Android on both phone and tablet. Simplification of the IA on mobile is acceptable and encouraged.



Analytics

The site will use Google Analytics to track the statistics on all pages, which will be shared with the OSGeo team. A Social CRM tool may also be used to track the sharing and discussion of resources included in the site on external social services.

Registration

The online platform will not require any membership registration but must provide the option for a newsletter subscription, the developed platform must also include a way to monitor participation through the approximate number of OSGeo visitors on the new platform, particularly actively engaged cities or countries and teams accessing guide materials, newsletter subscribers, and how it is referenced and used on external social media. The firm will provide recommendations as to how to do this effectively using external SaaS tools including Google Analytics.

Other Subscription services

This TOR does not include the cost of third party subscription/SaaS services, such as CRM, social media and newsletter services. However, it is expected that the new platform will be fully capable of integrating with these types of services.

Post-deployment

After the deployment of the platform, the firm, for one month, will monitor how the participants using the website and provide guidance and insight. From this one-month period, the firm will facilitate a workshop to refine and prioritize the potential improvements and recommendations.

This project is subject to extension and expansion based on recommendations for customization and improved usability after the basic deployment of the new site and considering feedback from the users of the site.

Component 3: Print Marketing Collateral Creation

ASTRID CAN YOU HELP HERE??

Project Timelines and Delivery Dates

Duration of the contract would be through August 31st, 2017, with delivery of the components articulated below.

Key delivery dates that need to be considered in a Project Plan and Technical Proposal are:

- ~~By July 10, 2015: Project plan and technical proposal deadline~~
- ~~Week of August 3, 2015: Project kick-off, consultation workshop to define the strategy~~



- ~~By August 21, 2015: Delivery of wireframes, information architecture, branding~~
- ~~By August 31: Delivery of mock up homepage and content~~
- ~~By September 11th: Feedback from OSGeo team on Mock ups, Information Architecture and Branding~~
- ~~By September 18th, 2015: Finalization of Branding and IA~~
- ~~By September 25th, 2015: Delivery of the homepage and content/collection templates on GitHub pages~~
- ~~By September 28th, 2015: Initial Migration of the platform complete~~
- ~~Week of October 5, 2015: Knowledge transfer, training of OSGeo staff~~
- ~~September 28 – October 30, 2015: Testing of the site and feedback from users~~
- ~~By October 30, 2015: Delivery of report outlining site test and feedback results~~

Staffing Requirements

Consulting Firms are free to propose a staffing plan and skill mix necessary to meet the objectives and scope of the services. If all the required skills are not available within the consulting firms, they are encouraged to make joint ventures with other firms.

The consulting firm should be able to demonstrate the ability to provide staff for the following roles:

1. Manager (Producer): responsible for the implementation of the online platform and overseeing the first and second objectives. Liaises with the client to support coordination and the successful completion of the project
2. Designer(s): responsible for the graphic design of the online platform and branding style guide
3. Developer(s): responsible for design of the information architecture behind the online platform
4. User experience specialist: responsible for gearing graphic design and platform development as easily comprehensible and fluid for average users. An evaluation and assessment of user experience shall be submitted once online platform has been launched.

Project Management

The Consultant will closely interact and report to the OSGeo Marketing Committee team that will accept the deliverables. The Consultant is encouraged to appoint a focal or contact person who can be competently consulted on this undertaking on a regular basis, preferably in the same time zone as the client point of contact. (Mention github issues, slack etc etc here)

Language

The working languages for this project shall be English for communication with OSGeo and its points of contact.



Submission Requirements

The OSGeo Foundation invites eligible firms to indicate their interest in providing the services detailed in this solicitation. Interested firms must provide information indicating that they are qualified to perform the services (brochures, description of similar assignments, experience in similar conditions, availability of appropriate skills among staff). Please note that the total size of all attachments should be less than 5 pages. Consultants may associate to enhance their qualifications.

Interested firms are hereby invited to submit expressions of interest. Expressions of Interest should be submitted, in English, electronically via email to xyz

Qualification Criteria

1. Provide information on the previous work of the firm including public site URLs.
2. Provide information on the qualifications of technical staff of the firm indicating its ability to meet the objectives of this project.
3. Provide information on the technical and managerial capabilities of the firm.
4. Provide information on their core business and years in business.

Selection and contracting may be made directly from responses to this request for expression of interest, but OSGeo's Marketing Committee may ask for a more complete technical and financial proposal. The consultant will be selected from a shortlist, subject to availability of funding.



ANNEXES

ANNEX 1. Components of the Online Platform

Home	The Homepage primarily should serve as the point of discovery for users seeking to find an OSGeo project appropriate for their needs or to engage with an osgeo affiliated local or technical community. It should also highlight and showcase the Foundations key initiatives as well as provide a snapshot of the resources and news items related to projects, initiatives and local organizations.
Projects	The Projects component of the website should serve as an index to the various OSGeo projects and a page describing each and linking to internal or external pages with more detail. A guided/faceted search interface should be developed that allows users to find a project appropriate for their needs based on their stated role(s). Individual project teams should be able to maintain their own content and/or link to external content about their project.
Local Organizations	The Local Organizations component of the site should serve as a place of discovery for users to find local chapters or Geo for All labs in their local area by using a map based interface to locate these entities. Local Organizations should be able to maintain their own content and/or link to external content about their entity. News and social media feeds should be integrated into this component to enable users to stay informed of current events and news related to each local organization. Local Organizations should also be able to add their events to the Event Calendar and have these events highlighted on their own page.
Initiatives	The initiatives component of the site should highlight the key foundation initiatives in a

	<p>high level way and explain how they fit together in the foundations objectives. Each initiative should have its own page to disseminate resources or add news etc. Some initiatives (including Geo For All) have more complex needs and should be considered as sub-sites within the larger site.</p>
News	<p>The news component of the site should provide a place to publish 'official' OSGeo news as well as aggregate content from projects, initiatives, or local organizations as well as to surface social media content in an easy to navigate fashion. Various OSGeo Stakeholders will be able to publish their own news on their portion of the site and content maintainers will be able surface the most current news on the homepage or top level news page.</p>
Downloads	<p>The downloads component of the site will provide an index into the various places to download OSGeo software including OSGeo branded installers including OSGeo for Windows and OSGeo Live. Many projects maintain their own download servers and some host them on external sites like GitHub. This section of the site should provide a clear pathway to downloading the software appropriate for the users needs and platform and should be tightly integrated with the Projects component.</p>
Gallery / Case Studies	<p>The Gallery and Case Studies component of the site will serve to highlight 'wins' from the Global OSGeo Community. Users will be able to provide and/or link to content that showcases how OSGeo software is being used around the world to solve real problems for users.</p>
Events	<p>The Events section of the site will serve as a Global Calendar to OSGeo affiliated events around the world. Users from local organizations, or projects will be able to provide the details about their event including links to external sites and social media feeds.</p>



	Organizers of local events should be able to provide hashtags, photostreams or other content to link users together before, during and after the events.
Incubator	The Incubator component of the site will provide a way for the foundation to describe the process of becoming a member project and the expectations and requirements for a project to join the foundation. Incubating projects should be able to showcase their project in the larger set of projects as well as link to external resources, events, case studies etc.
Education (Geo for All)	The Geo for All component of the website will provide a place to aggregate educational content relevant to OSGeo projects and activities. Local Geo for All Laboratories will be able to share their own localized content and users from these labs will be able to connect with their peers locally and globally to share knowledge and solve challenges together.
Users	The Users component of the site will provide a map based interface to the family of OSGeo users around the world. Users will be able to update their own information/profile including project and local organization affiliations and to search for and connect with users in their local area. Each users profile should be able to highlight their contributions to the various projects.
Commercial Providers	The Commercial Providers section of the site will provide an opportunity for individual consultants companies that work professionally with OSGeo software to showcase their personal or company qualifications by providing a structured profile. Users will be able to search or filter for providers that match their requirements.
Partners	The Partners component of the website will be used to showcase the various partner organizations that OSGeo works with

	including the UN and various International Organisations. The partner information will be linked to relevant initiatives, projects and resources
Sponsors / Contributors	The Sponsors component of the site will provide a way for OSGeo to recognize the sponsors that support the foundation and allow them to showcase their technical contributions. Sponsors and contributors should be able to highlight their contributions to the various projects they participate in.

ANNEX 2. List of OSGeo sub-brands or online properties

OSGeo Properties / Sites / Sub Brands

- Journal
- News
- News Aggregator (fold into single news?)
- Planet
- Partners
- Events Calendar
- FOSS4G
- Educational Content (fold into Geo for All)
- Download Server
- Sol Katz
- Incubator
- Geo for All
- GeoData
- OpenGeoScience
- UN Committee
- Conference Committee (see FOSS4G)
- Osgeo4W
- OSGeoLive
- Case Studies
- Gallery
- User Map + Profiles
- Provider Map/Search + Profiles
- Sponsors
- Swag store
- GeoHealthCheck

Technical Properties (with their own subdomain)

- Git
- svn
- Trac
- Wiki
- mail

Projects

- GeoNode (own site)
- GRASS GIS (subdomain)
- gvSIG (own site)
- Marble (own site)
- QGIS (own site)



- FDO (subdomain)
- GDAL/OGR (own site)
- GEOS (trac)
- GeoTools (own site)
- OSSIM (trac)
- PostGIS (own site)
- GeoNetwork (own site)
- pycsw (own site)
- deegree (own site)
- geomajas (own site)
- GeoMOOSE (own site)
- GeoServer (own site)
- Mapbender (own site)
- MapFish (own site)
- MapGuide (subdomain)
- MapServer (own site)
- OpenLayers (own site)
- Opticks (own site)
- MetaCRS (subdomain)
- Orfeo ToolBox (own site)
- istSOS (own site)
- PyWPS (own site)
- Team Engine (sourceforge)
- ZOO-Project (own site)
- Other Community Projects

Local Chapters

- Belgium OSGeo Chapter (wiki)
- British Columbia, Canada OSGeo Chapter (wiki)
- Cascadia OSGeo Chapter (wiki)
- California, USA OSGeo Chapter (wiki)
- China OSGeo Chapter (wiki)
- Czech OSGeo Chapter (wiki)
- Dutch Language OSGeo Chapter (own site)
- FOSSGIS e.V.: German Language OSGeo Chapter (own site)
- French language OSGeo Chapter (wiki)
- Finland OSGeo Chapter (own site)
- India OSGeo Chapter (wiki)
- Italian language OSGeo Chapter (wiki)
- Japan OSGeo Chapter (wiki)
- Korean Language OSGeo Chapter (wiki)
- New Mexico, USA OSGeo Chapter (wiki)
- Ottawa, Canada OSGeo Chapter (wiki)



- [PDX-OSGeo Chapter \(wiki\)](#)
- [Poland OSGeo Chapter \(osgeo.org/pl\)](#)
- [Romanian OSGeo Chapter \(wiki\)](#)
- [Quebec OSGeo Chapter \(wiki\)](#)
- [Sénégal OSGeo Chapter \(wiki\)](#)
- [Spanish Language OSGeo Chapter \(subdomain\)](#)
- [Twin Cities, USA OSGeo Chapter \(wiki\)](#)
- [United Kingdom OSGeo Chapter \(osgeo.org/uk\)](#)
- [Vietnam OSGeo Chapter \(wiki\)](#)
- [\(All 'in formation' on wiki\)](#)
- [Croatia? \(hr.osgeo.org\)](#)