

## RFP: Myotonic.org Drupal 7 to 9 Migration / Upgrade

### Opportunity

The Myotonic Dystrophy Foundation (MDF) would like to engage a Drupal focused Web Designer or Agency to upgrade [myotonic.org's](https://myotonic.org) content management system from Drupal 7 to Drupal 9 before October 2022.

### About the Myotonic Dystrophy Foundation

Founded in 2007, MDF is the leading global advocacy organization helping families and professionals understand DM, a rare, genetic, multisystem, highly variable neuromuscular disease. MDF helps constituents identify resources and support, improve quality care, and advance research for management and cures. MDF has a global reach, assisting families and championing other advocacy organizations in more than 80 countries around the world. As many as 150,000 individuals may be at risk for the most common form of DM in the United States alone. Tens of thousands of affected families as well as providers, industry partners, researchers, and donors, together, form the MDF.

**Vision:** We envision a world with treatments and a cure for myotonic dystrophy (DM).

**Mission:** The MDF mission is Community, Care, and a Cure.

- We support and connect the myotonic dystrophy community.
- We provide resources and advocate for care.
- We accelerate research toward treatments and a cure.

### Goals

Project goals include:

- 1) Migrate all existing content (copy, images and files) as efficiently as possible to Drupal 9.
- 2) Retain existing design, templates, functionality, accessibility and integrations in Drupal 9, which may include identifying alternatives, recommending process changes, or recreating themes or custom functions to maintain the sites integrity.
- 3) Leverage new Drupal 9 functionality to improve site management and usability
- 4) Ensure best practices in website security, speed, and file management are implemented
- 5) Create documentation and train Communications staff on Drupal 9 administration and new or updated functionality.

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## Scope

We would like to include, but not be limited to, the following during the scope of this project:

1. **Create a project timeline** with an associated budget and work plan including MDF staff time.
2. **Backup of our existing site** and file system for MDF's archives and migration quality assurance.
3. Work with MDF's Communications & Technology Manager to:
  - a. **Create a complete site audit of our Drupal 7 site and subdomains.** This should include all types of functionality and entity types (Modules, Content types, Taxonomies, Paragraphs, etc).
  - b. **Identify the content types and structure of the existing site and document the items to be migrated.** Determine a list of all the data that needs to be migrated to the new site. Flag any broken or duplicated content for review.
  - c. **Identify what pieces should be manually recreated.** Views, webforms, and content types with a small number of entries may be quicker to build by hand.
  - d. **Identify custom code and missing contrib functionality.** Some specific modules may have been customized or are not compatible with Drupal 9.
4. **Create a short PowerPoint presentation** to summarize the audit findings, potential obstacles, associated recommendations, and updated timeline.
5. **Create a Development Server and start the upgrade progress.** A custom migration module should be made for each site, creating the fields, content types, and entities on the new Drupal site.
6. **Theme the new site and complete additional manual work.** This includes recreating the A-Line theme based off of Bootstrap 3, organizing content, and other customizations. Ensure images deliver appropriately to prevent slow page loads.
7. **Audit the Drupal 9 site.** Confirm content, themes, and functionality have successfully ported. Ensure all major browsers properly run and display the site. Allow MDF staff to beta test and bug find on the new site.
8. Work with MDF's Communications & Technology Manager to
  - a. **Schedule production webserver upgrade,** downtime, and final migration to live site. Ensure SSL and domains are correctly configured with Site5 hosting and GoDaddy.com.
9. **Confirm web traffic** appears on the new site in Google Analytics.

10. Any additional troubleshooting or support required to finalize the live site on myotonic.org
11. Create a final PowerPoint presentation summarizing the project with test results that confirm a successful migration.
12. Create documentation for a website administrator to ensure best practices are adopted and maintained after the project.
  - a. The system should be built in such a way that existing MDF staff are able to maintain, upgrade and expand the functionality of the system in the future.
  - b. Build process for the theme should be well documented, should our internal team need to make changes.
    - i. Include documentation of where 'base styles' are defined (applicable to all areas of the site) vs. override styles
    - ii. Include step-by-step instructions for required build tools, e.g: npm, gulp, sass compilation etc.

### **Proposal Guidelines and Submission Process**

Proposals will be submitted through Jan 15<sup>th</sup> and interviews will be held through Feb 1<sup>st</sup>. We hope to select a consultant and begin the migration preparation and user study by Feb 15<sup>th</sup>.

Proposals should be sent directly to Kleed Cumming, MDF's Technology and Communications Manager, @ [Kleed.Cumming@myotonic.org](mailto:Kleed.Cumming@myotonic.org).

Proposals should include the following information:

- Detailed timeline and budget containing all costs, including staff time and projected communication, that will be undertaken for upgrading our Drupal 7 site
- An explanation of the steps and procedures that will be undertaken as part of the upgrade process, and processes and contingencies in place to identify and fix any bugs and issues resulting from the upgrade.
- Your company history
- A Portfolio with samples of past work, with a specific focus on
  - Non-profit clients
  - Theme porting from Drupal 7 to Drupal 9
  - Responsive design
  - Accessibility
- Description of standard development and support methodology