



Request for Proposal
Website Redevelopment

RFP release date July 15, 2014
All questions due July 24th 2014, 11am EST
Proposals due August 13, 2014 11am EST

PROPRIETARY AND CONFIDENTIAL

1. INTRODUCTION TO INDEPENDENCE BUSINESS ALLIANCE

The Independence Business Alliance (IBA) is the Lesbian Gay Bisexual and Transgender (LGBT) Chamber of Commerce for the Greater Philadelphia region. The IBA is a membership-based business advocacy organization, dedicated to making the Philadelphia region an influential and diverse LGBT business community with an impact on economic development, equal rights and policy issues.

The mission of the Independence Business Alliance is to promote Greater Philadelphia's LGBT business and leadership communities to:

- * Enhance financial opportunities
- * Foster diversity
- * Develop leadership and collaboration
- * Advocate for positive change

The IBA is an affiliate of the National Gay and Lesbian Chamber of Commerce (NGLCC), which is a business advocate and direct link between the LGBT business owners, corporations and government. The NGLCC was founded as the exclusive organization for certification of LGBT owned businesses and works to foster mutually beneficial opportunities for small businesses and corporate members. The NGLCC has more than 50 affiliate chambers like the IBA throughout the country.

2. GENERAL INSTRUCTIONS

2.1 Proposal Format

- Please provide your response to requirements listed herein in a WORD DOCUMENT. Your responses must coordinate with the numbering of items within this Request for Proposal (RFP). Please take care not to incorporate extraneous, non-related materials in your RFP response.
- For supporting materials, such as PowerPoint documents, you are invited to send those documents *separate* from the response to the requirements herein.
- If invited for a capabilities demonstration, suppliers will have an opportunity to discuss other value-add or non-related activities at the end of their demonstration.

2.2 Proposal Period

The proposal submitted in response to this RFP shall remain firm and valid for a period of ninety (90) working days from the date of your submission.

2.3 Proposal Quantities

One (1) electronic copy.

2.4 Proposal Submission Closing Date

Proposals are due to the IBA email inbox specified by **August 13, 2014 11am EST**. Proposals received after that time will not be considered.

2.5 Address

Delivery must be made to the attention of:

Tom Cavanaugh
Executive Administrator
Independence Business Alliance
1315 Walnut Street – Suite 1132
Philadelphia, PA 19107

3. GENERAL CONDITIONS

3.1 Incorporating Supplier's Proposal into Contract

All proposals, information, and responses from the Supplier must be submitted in writing. Unless supplemental oral commentary is specifically requested by IBA in writing, oral communications will not be considered in connection with any proposal. All proposals, information, and responses submitted by a Supplier will be incorporated into and made a part of any final agreement between IBA and such Supplier. No such information or other material should be submitted that cannot be so incorporated into the agreement.

3.2 Liability

IBA shall incur no obligation or liability whatsoever to anyone by issuance of this RFP or action by any party relative hereto.

3.3 Request for Proposal

This RFP scope consists of Section 5.1 through Section 5.4 as detailed herein. Each Supplier should analyze all Sections of this RFP and provide responses to these sections.

3.4 Country of Origin

For the purpose of this proposal, this shall be a United States-based contract originating from Pennsylvania.

3.5 Conditions /Assumptions

Supplier is required to clearly explain any assumptions or conditions it imposes on or includes in its Proposal.

3.6 Supplier responsibility to resolve questions

Supplier understands and agrees that: (a) it has an affirmative duty to inquire about and seek clarification of any question or other item in the RFP that Supplier does not fully understand or that Supplier reasonably believes is susceptible to more than one interpretation; and (2) the Proposal submitted by Supplier must explain any and all conditions, exceptions, or limitations included in any response by Supplier to any question or other item in the RFP.

Questions should be submitted by **July 24th, 2014 by 7pm** to:

Tom Cavanaugh
Executive Administrator
tomc@independencebusinessalliance.com

Responses to questions will be provided by the IBA no later than July 30, 2014.

3.7 Unsuccessful Responses

IBA will use its best efforts to notify each Supplier as soon as possible as to whether it is the Award Recipient.

3.8 Supplier qualifications

Supplier must conduct business and interact with IBA consistent with its mission of promoting diversity and economic development to LGBT professionals and their allies. IBA is committed,

wherever possible, to source services from suppliers who respect human rights, ethics and the environment and have responsible policies and practices. Specifically, we expect our suppliers to operate in a manner that is consistent with these values and relevant to their respective services.

Supplier should be prepared to demonstrate that it can meet all the proposed requirements detailed herein.

3.9 Supplier's cost

Any costs incurred by the Supplier in responding to this RFP or in support of activities associated with the Proposal to this RFP, are to be borne by the Supplier and are not reimbursable by IBA.

3.10 Confidentiality

Proposals and the information contained therein will be considered confidential and will not be shared with any entities or individuals other than for the purposes of evaluating the various RFPs.

3.11 Contract

Your Company should be prepared to enter into a contract with terms mutually agreed upon.

3.12 Code of Conduct

It is the objective of IBA to obtain the best services possible by giving fair and impartial consideration to all Suppliers invited to submit a Proposal. Every potential Supplier will be qualified on a fair and equal basis. Suppliers will be given the same information and treated equally with respect to the selection process. The granting of any advantage to one while excluding others is not permitted.

3.13 IBA Contact

Any questions, clarifications or other communications concerning this RFP **must** be submitted before **July 24th, 2014 by 7pm** directed to:

Tom Cavanaugh
Executive Administrator
tomc@independencebusinessalliance.com

3.14 Right to Amend Request for Proposal

IBA reserves the right to amend this RFP in any manner prior to contract award. IBA will notify all responsive Suppliers in this event.

3.15 Right to Cancel Request for Proposal

IBA reserves the right to cancel the proposed RFP at any time prior to the execution of a written contract without incurring liability to IBA, if in its sole determination; its best interest would be served by doing so.

3.16 Proposal Format

To allow for a better understanding of your proposal and to avoid confusion between the parties, we request that the Supplier follow the order of information as requested in Section 6. A specific proposal format is not required, but we request that all of the items in Section 5 are clearly addressed in your response.

3.17 Pricing

All fee schedule types will be considered. Suppliers are asked to break out all fees, costs and third-party costs. Please also include long-term maintenance and/or hosting fees. In order to meet this desired schedule, the IBA is open to a phased approach that may require some features to be implemented after an initial launch. Price accordingly.

4. PROJECT OVERVIEW AND OBJECTIVE

- 4.1 The Independence Business Alliance built its original website in 2006. It was updated in 2010, and it has since outgrown the design, features and functionality. The site serves both the members and the organization's staff and Board.

The IBA currently hosts 225 member businesses. Over the past year, the IBA has experienced a 30% growth in membership, and we anticipate this trend to continue. We therefore require a scalable solution that will sustain continued growth of this pace.

From an internal perspective, the site currently manages all memberships to the organization, events and news announcements. It has a database of memberships including join date, payment date/type and membership period. Contact information and custom fields are also attached to each membership record. The system currently integrates with our PayPal credit card processing system and allows for manual updating of payment details when paying by check.

From an external perspective, the site serves as the organization's face and first point of contact for our members. We are seeking a dramatically different look and feel from the current website. It is the organization's goal to make the new site much more interactive and user-friendly. We would like to see a higher design standard while maintaining the functionality of the backend databases. The site should reflect the organization's growth, agility, and commitment to LGBT business. It must have the capacity to provide rich content (photos, videos, articles) that is accessible from any device and serve as a hub for the region's growing LGBT business community.

The current site was built with the open-source platform Drupal. Modules were added and customized to meet our needs. We are in favor of implementing an open sourced framework that is scalable and stable. We are interested in the best possible solution to meet our membership management needs. The best solution may continue to be Drupal or may be another platform. We are interested in hearing Supplier's recommendations.

Our site is currently hosted at ServInt, email at Rackspace, and email marketing at Vertical Response. Within reason, we are open to changing providers if it will provide the best overall solution.

The design of the site must consider viewing and navigation on a mobile device. A responsive web design is required for this rebuild.

We expect the successful Supplier to carry out a proper discovery phase to refine the requirements in Section 5. We are particularly interested in reading about applicant Supplier's approach to discovery, requirements tracking, and quality assurance. We would also like applicant Suppliers to include details about training for our administrative team on use of the CMS and maintenance of the website.

The desired launch date is January 2015. In order to meet this schedule, the IBA is open to a phased approach that may require some features to be implemented after an initial launch. Explain any proposed phase approaches in your response.

5. PROJECT SCOPE, BUSINESS/TECHNICAL REQUIREMENTS

We are relying on the Supplier to propose a design process for our consideration. We request an explanation of Supplier's design process and methodology and how it relates to this project.

The IBA requires a seamlessly integrated content management system (CMS), constituent relationship management system (CRM), and email marketing service. The complete solution should allow for data to pass from the CMS to the CRM/email marketing system in both directions (additions and unsubscribes) so that updates in either system are synchronized across both.

The IBA seeks to stand out among peer chamber organizations and expects the website to represent the value of the IBA both to members and to the community. We intend to provide a website that delivers an outstanding experience for new and existing members and improves the administrative process of member management.

The design must consider an innovative and engaging interaction with intuitive and simplified navigation. Members should be able to access and update their own information with as little support as necessary from the IBA. The site administrators must have the ability to seamlessly manage member information, including generating reports and processing payment, with as much automation as possible. The administrator must easily be able to efficiently market events through email and social media marketing both before and after events.

The following list of items refrains from naming specific software solutions. We are looking to the Supplier to make suggestions for the best overall solution package.

5.1 Visual Identity

A. Logo

The IBA is satisfied with the current logo. We have no desire to modify the IBA's logo.

B. Color Scheme

The IBA is satisfied with the current color scheme of the website. We have no desire to modify the primary color scheme, however we are open to a secondary color palette that might enhance our visual identity and improve the design of the website.

C. Typography

The IBA currently utilizes Trebuchet across the current website. We are open to alternate fonts that optimally represent the IBA and effectively communicate with members.

D. Imagery System

The IBA relies on heavy use of imagery, both logos and photos, to communicate with our members. The website must be able to display a large number of images in an aesthetically pleasing way that complements the accompanying text. There should also be functionality that provides the ability to resize and/or optimize image files. The IBA is interested in employing large background images on the homepage.

5.2 User Tasks

The website will contain content and features for three primary audiences: (1) the general public, (2) members, and (3) non-member account holders. In order for the website to be successful, visitors must be able to perform the following tasks:

- A. General Public
 1. View upcoming events from the homepage
 2. Find out who the IBA is
 3. Learn about the benefits of being an IBA member
 4. Read about featured new member businesses

5. Easily search the member business directory through advanced search options, including business name, contact name, industry, business type, location (city or zip code; within X miles radius)
6. Signup for newsletter
7. Search the job bank
8. Create a non-member account
9. Receive authentication email after creating account

B. Member Businesses

1. Join/Renew membership
2. Receive automated confirmation email after joining that confirms account login, membership level, membership dates, amount paid, explanation of benefits
3. Receive renewal notifications based on anniversary
4. Add up to three contacts/users of account, depending on level of membership
5. Create and maintain a public profile page that includes logo, photo, business name, contact name, industry, business type, location, website and social media links, videos
6. Hide/unhide public profiles
7. Track profile views
8. Post a request for proposals, moderated by admin (members only)
9. Subscribe to proposals based on specific industries or services and receive email alerts when matching proposals are posted (members only)
10. Post in the job bank
11. Purchase event sponsorship packages
12. Buy advertising space on the website, including banner ads
13. Download IBA logo pack for co-branding opportunities
14. Register for events
15. Experience streamlined event registration process
16. Receive automated email confirmation upon registration
17. Submit payment for events through PayPal
18. Receive reminders of upcoming events
19. Securely log in to member account
20. Retrieve forgotten password
21. Change password

C. Non-member Account Holders

1. Register for events
2. Experience streamlined event registration process
3. Receive automated email confirmation upon registration
4. Submit payment for events through PayPal
5. Receive reminders of upcoming events
6. Securely log in to member account
7. Retrieve forgotten password
8. Change password

A. Administrative Tasks

In order for the website to be successful, administrators must be able to perform the following tasks:

1. Add and edit content including text, images, video, and files easily via the CMS
2. Create web forms as needed (i.e., application for scholarship, business award, or board of directors. member surveys)
3. Preview content before publishing
4. Generate reports, including:
 - a. Site visitors

- b. Event attendance – member and nonmember
 - c. Ticket purchases - member and nonmember
 - d. Email open rate - member and nonmember
 - e. Payment
 - f. Changes to user accounts, including generating a time period report summarizing all changes by account
5. Create events in a list form and calendar form, with an archive of events
 6. Synchronize event content with CRM
 7. Enable and disable registrations for individual events, to include time cutoff and maximum attendance limitations
 8. Set cost per ticket and other variations for individual events, including pricing per user type (member level, nonmember, etc.)

5.3 Functionality

A. Site Functionality

1. Drop-down navigation menu
2. Member login on homepage
3. E-news registration
4. Membership application and renewal (and payment)
5. Events registration and payment
6. Online payment system
7. Members Only login
8. Google Analytics integration
9. Facebook Like button
10. Social media sharing
11. Linking – all internal links should open in the same window/tab; all external links must open in a separate window/tab
12. Updates to membership data automatically synced between CMS, CMR, and email marketing system

B. Constituent Relationship Management (CRM) Requirements

1. General requirements:
 - a. Integration with CMS
 - b. Canned and Ad Hoc Reporting
 - c. Data Filtering and Export
 - d. Data import – existing data must be transferred
 - e. Open API, with bi-directional integration with website
 - f. Mailing Labels
 - g. Merge Letters
 - h. Integration with e-newsletter and reporting
 - i. Contact management information
 - j. Task management
 - k. E-mail alerts on tasks
 - l. Fully configurable and extensible
2. Membership requirements:
 - a. Manage membership levels, description, and price
 - b. Membership reporting, based on status and payments
 - c. Ability to manually add and update membership records through the CRM, and have any updates reflected instantly in the CMS.
3. Events requirements:

- a. Event content object synchronized with CMS
 - b. Registrations and Payment reporting per event
 - c. Ability to add varying payment options based on membership type or lack thereof and separate pricing for members vs. non-members.
 - d. Ability to record events registrations and payment method (check, eft, AP) in the CRM
4. Subscriptions and Sponsorship Tracking:
- a. Integration with online payment processing account or PayPal API
 - b. Online subscription payments recorded in CRM
 - c. Sponsorships added manually in CRM
 - d. All subscription/sponsorship revenue fully tracked and reportable, connected to organization records

5.4 Content to Accommodate

The website design and content organization must be SEO-friendly. The IBA anticipates the following content items to appear on the website.

A. Public Content

1. Searchable member business directory
2. Featured event
3. LGBTBE spotlight
4. Corporate partner spotlight
5. Member spotlight
6. Promotion of new members
7. Corporate logos on the homepage
8. Brief explanation of NGLCC partnership
9. Events listings
10. Member Directory with
11. Events Calendar
12. Job bank
13. RFP posting board
14. Sponsor logos and profiles
15. Paid ad space for sponsors and members
16. Networking section/opportunities (ConnX, WIB)
17. Resources (NGLCC, NE affiliates, GPCC, etc.)
18. News headlines with links to articles
19. Links to IBA's Facebook and Twitter
20. Event photos and videos
21. IBA governance information
22. Testimonials
23. Contact information in footer
24. Sitemap in footer
25. Blog (possibly)

B. Exclusive Content for Members (login required)

1. Member to member discount codes
2. RFP posting board with email alert for subscribers

C. Intranet - repository for Board Members' contact information, documents and images that won't be public to the membership or visitors of the website, including a shared calendar that the entire Board would have access to and would include events, meeting dates, etc.

6. PROPOSAL FORMAT

6.1 Outline

We are expecting the Supplier to demonstrate their knowledge and presentation skills by creatively responding to this RFP. The elements that we would like to see included are:

1. Firm profile and history (including awards, accolades, or other industry recognition)
2. List of key personnel dedicated to project and their qualifications (if including resumes, please append to end of document)
3. Examples of relevant project work and design style, including past performance with event RSVP systems, member databases, online directories, social media integration and payment systems (e-commerce).
4. Responses to Section 5 in narrative, list or project plan format; include attention to discovery and requirements tracking methodology, quality assurance, training, plus communication plan
5. Proposed schedule with deliverables and milestones, including phased approach if recommended
6. Cost estimate, including ongoing maintenance retainer or hourly rate
7. 3 client references – 2 current and 1 former
8. Additional information (press, marketing materials, testimonials, etc.)

6.2 Expected Timeline

The IBA anticipates the following schedule for the RFP process:

July 15 - release of RFP

July 24 - questions due by email before 11am

July 30 - answers to questions emailed to respondents

August 13 – proposals due via email by 11am

August 21 - selected respondents invited for interview/demonstration

August 25-28 - interviews scheduled

September 9 – winning vendor notified

Proposals are due via email by **Aug 13, 2014 11am EST**. Proposals received after that time will not be considered. Proposals must be addressed to Tom Cavanaugh, Executive Administrator, tomc@independencebusinessalliance.com.

Thank you for your involvement in the IBA and for your consideration of this RFP.