

Center for Entrepreneurial Leadership Alumni Association

Website Redevelopment Project

www.cel-aa.org

Request for Proposals

February 3rd, 2012

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Project Summary

The Center for Entrepreneurial Leadership Alumni Association (CELAA) is looking for solutions to redevelop their website located at <http://www.cel-aa.org>. The website should receive a new look, new information architecture, custom components and tools, and preferably be powered by a content management solution.

Organization Information

The UB Center for Entrepreneurial Leadership Alumni Association perpetuates its members' amazing UB CEL CORE experiences and helps graduates continue to benefit from the many relationships they formed as program participants. CELAA keeps them connected to their peers, their mentors and the board of advisors.

As a growing organization, CELAA is a leading voice for Small Business in Western New York. As CELAA members, they continue to share in the personal and professional benefits of the CEL program and its affiliation with the UB School of Management.

CELAA Mission Statement:

"We promote business growth by member driven networking, mentoring and education, extending your UB CEL experience."

CELAA strives to complete this mission by holding regular educational seminars, networking events between members, assisting new class participants with their experience in the CORE program, and acting as a voice of the graduates to drive the spirit of regional and national entrepreneurship.

Three key or primary events that occur annually are the regional "Entrepalooza", the summer golf tournament, and the winter formal holiday dinner. The time between these milestone events are then peppered with smaller social, informational, and educational gatherings.

The organization also acts as a resource for the continued growth of its members' businesses. Some of these tools include the redistribution and sharing of news, company events, job openings, struggle or challenge consulting, business strategic planning and advisory councils, and more.

Proposal Guidelines & Terms

Only those companies that are graduates of or currently enrolled in UB CEL CORE or MWEE programs are eligible to bid. Companies should have significant “web development” experience and it should be a primary service in their business and revenue generation.

To be fair and neutral in judging the proposal submissions, it is required that your proposal be written in a way to not disclose your organization’s name within the proposal itself. To the greatest extent possible we really would like to make this a blind selection process.

To that end, each proposal should be submitted with a cover sheet that clearly includes all company information, contact information, and other such information that directly references your people, contact information, or company name. This criteria will be known as a “white-label” proposal for reference in this document. Within the proposal itself, in place of your name it is expected you will use the term “Company” or “Firm” or a similar generic term in reference to your organization. Similar generic nouns should be used for the people or team referenced in the document (ie. Account Manager, Project Manager, Designer, etc)

Proposals **MUST** be submitted in **PDF** format before 5pm on the due date as specified in the timeline section of this document.

Any submissions not meeting the delivery criteria, due date, or white-label format will be rejected from the bidding process.

Additional Criteria

The proposal should clearly state the milestones and proposed dates associated with each that correlate with the timeline requirements proposed within.

A detailed breakdown of the time commitments and any deliverable required by CELAA should be included as a separate page in the proposal. This should outline all required personnel interaction, time, response requirements, and other such needs that could hinder or delay completion of the project in a timely fashion.

Submission Information

Please submit proposals in Adobe PDF format.

A cover sheet should be the only place in the document with the company’s name and contact information. No submissions after 5pm on the due date will be accepted.

Email all completed proposals to **Linda Anderson** in the CEL Office.

Email To : lma33@buffalo.edu

Purpose, Description, Objectives

Why is this project being deemed necessary?

It has been determined both internally within the board and by the membership user committee that after several years of the current look-and-feel, the CELAA website needs to be updated to increase its functionality, user-friendliness, and general design and appearance. While the current site serves to register people for events, its design is several years old, it has shown some limitations on several occasions and provides little additional incentive for members to use or visit the site on a regular basis.

What end results are desired?

CELAA wishes for the new website to be attractive and utilize modern web development techniques so the site renders correctly on ALL modern browsers (including smart phones and tablets).

While CELAA would like to incorporate significant functionality, the following items stand out as **must-haves**:

- The event system is critical and will remain a key focus of the new website. It should be robust, scalable, and configurable (see scope for specific details). Secure credit card access and authorization is a requirement.
- A content management system that allows CELAA administrators to easily add, remove and update content without re-programming the web site.
- The membership directory (elucidated later in this RFP) must allow significant member ease of use while having built-in protections that allow for easy but safe editing and use.

Key objective : Increase member and potential member interaction within the site to keep people engaged in an ongoing way.

What goals do we have for the new website?

- Communicate and register members and non-members for events (with robust detail and capability)
- Streamline accounting breakdowns for all commerce transactions related to events, memberships, sponsorships, etc.
- Engage and connect members through a robust membership directory
- Allow members to “push” their own information to the other members through functionality of the site (not via email, but by using the scope of features and tools as noted below)
- Provide a source for individual graduating classes to stay connected
- Present a strong value proposition to encourage and directly sell/renew memberships online
- Connect all the social media, email subscriptions, and communications tools in one place

Audience

The audience is made up of several groups of people, ordered by targeted importance related to their interaction on a regular basis. This audience is meant as the “front end”, those that visit... not those that administer.

1. Current CELAA Members
2. Potential or Past CELAA Members (aka *Potential Members*)
3. CEL Graduates currently enrolled in the UB Programs
4. CELAA Board
5. Program candidates interested in CEL
6. CEL Office

Timeline

The timeline outlined below is ideal and it is asked that all proposals submitted can perform the requirements within the allocated time frame based on active participation of the CELAA appointed representative.

February 3rd, 2012

RFP published to the CELAA website and an announcement is made to the membership inviting them to participate in the bidding process.

February 24th, 2012

Due date for the submission of complete proposals to the CEL Office as per the 5pm submission instructions

February 25th until March 4th

Committee members will individually review submitted proposals prior to formal meeting/discussion

March 5th, 2012

Formal committee meeting for joint review of eligible proposals. All qualified proposals will be distributed to the board for personal individual review.

March 7th, 2012

1pm to 3pm may be used to bring vendor in for further questions regarding their proposal, all vendors should block this time as tentative in case the bid is selected for probing review.

March 9th, 2012

Committee will present a choice proposal to the board as a general recommendation with reasoning. The board will have time to address final concerns and a formal vote will be held to choose a vendor

March 10th to March 31st

CELAA representative will be in contact with selected vendor to finalize timelines, deliverables, and contracting.

April 1st, 2012

Work on the project officially kicks off

June 15th, 2012

Vendor has a presentable "stage" to review the majority of the working site with only content, subtle changes, or database population (directory, etc) still required for completion

July 1, 2012

Initial site is ready for launch on the live CELAA domain

August 1, 2012

All final adjustments, content, changes, updates, bugs, etc are completed and the project is officially closed

Budget

There has not been an established budget for the project as it is unknown the range of technologies that may be available. CELAA has set aside significant funding for this project.

Please submit a fixed budget proposal for the functionality that you are offering. If any areas seem ambiguous or unclear in the bid, please submit questions via Linda Anderson at the CEL office prior to the bid due date so that there may be time to answer them. Questions and their answers will be made available to all vendors.

Itemized Costing

Proposals should be broken into line items, optional items, and/or group based bundle pricing to make it as easy as possible to CELAA to understand the cost of components, features, design elements, etc. This is needed to insure that features and functionality can be prioritized and/or shelved for later if deemed less important in this release. Please provide as much detail as reasonable.

Pricing Breakdown

Each proposal should be broken down into relevant cost categories:

- Fixed price upfront (one-time fees)
- Regular recurring monthly fees (billed each month)
- Annual fees (domain, SSL, etc).

Since web site evolution is likely and can result in downstream work, if possible, please estimate

- An annual summary after year 1 of total costs for subsequent years (all monthly, annual, etc rolled up)
- A 3-year total cost including all fixed price, recurring monthly, and annual fees
- Hourly rates for additional work.

Payment Plan

CELAA desires a payment plan tied to specific project milestones and not based solely on dates. This makes the assumption that CELAA has met all of its timely obligations as expected so as not to delay delivery of the milestones.

- It is preferred that no more than 50% of the fixed price upfront fees be paid as an initial deposit.
- It is preferred that the second milestone be 25% of the balance when the design is officially approved and before it is turned into a “staged” website
- It is preferred that the final payment be 25% when the website “goes live” on its domain.

If dates are required in the proposal, they should be clearly defined in the pricing section of the proposal.

Monthly service is not to begin until

- The CELAA administrators are given the “keys” and the site either “goes live” on its domain;
- Or the vendor has completed the full scope and CELAA is purely working on their own content/adjustments within the CMS before authorizing the live launch.

Qualifications

Please provide short answers to the following:

Company Focus & Specialization

1. How long has the company been in business? (0-2 years, 2-5 years, 5-10 years, > 10 years)
2. Size of your company and the percentage of staff focused on client website operations.
3. What percentage of your revenue is generated directly by the services of website design and development (“hosting” can be included if it is specific to “website hosting” and not other types of IT licenses, data center co-location, bandwidth provisions, phone systems, etc)

Capabilities

1. Any full-time graphic designers on staff?
2. How many server-side web programmers on staff full time (ASP, PHP, JSP, etc)?
3. Are your project managers also the programmers/designers?
4. Do you use any project management tools?
5. Do you provide help desk (day-to-day) support after the site launches?
6. Have you previously developed websites for specifically membership-driven organizations?
7. What is your typical turnaround time for small, non-complex requests?

Technology

1. Do you utilize a content management system on your websites and if so, what’s your favorite?
2. Additional CMS questions (for the platform of choice in your proposal):
 - a. Can you perform all CMS code edits with the staff on hand or do you outsource this support?
 - b. Is there additional cost to repair future glitches, bugs, or broken code in the CMS?
 - c. Is there additional cost for upgrades and new releases of the CMS platform at anytime in the future?
3. Do you have the capability to open up data with a formal API (so that outside software can communicate with the system)?
4. Do you have the ability to push news, events, testimonials, or other such lists out to the public in a formal RSS feed for consumption by readers and news feeders?

Qualification Open Answers

Please answer the following questions in paragraph form within your proposal.

1. Describe your project process in detail for the complete interaction of the project.
2. Describe how your phone support works (and what is included) after the site goes live.
3. Include 3-5 website examples of recent work [anything with membership and events is a plus] - please provide a screen capture if possible.

Evaluation Criteria

All proposals and vendors will be judged using the following criteria. No particular weight is given to any one criteria over the others but will be combined in a total evaluation.

- Experience with member-driven organizational website development and support.
- Completeness of the proposal for the scope of needs (how much can/can't be met/delivered).
- Ability to provide long term cost effective support, upgrades, and enhancements.
- Total project budget and costing over 3 years.
- Visible project planning processes and communication flow.
- Experience with content management systems.
- Clarity of communication.

Specific Needs and Scope of Work

The following are identified as key initiatives ordered from most important to least. It is crucial that all proposals provide pricing that relates to specific component costs and options so that pieces can be removed if not feasible for this version.

The site should be designed to meet modern design practices and trends. It should reflect a professional membership-driven organization. One or more areas must be available for sponsor advertising in the design. Design should be “responsive” in that it automatically reconfigures and lays itself out for optimal display on different size screens and devices (PCs, tablets, mobile phones, etc). The code should utilize techniques such as graceful degradation of, for example, JavaScript, CSS 3, and HTML 5 where appropriate. It should be compatible with modern browsers and strive to meet W3C standards (<http://validator.w3.org/>) and ADA 508 Compliance (<http://www.w3.org/WAI/RC/tools/complete>) where relevant.

Because of the desire to execute secure credit card transactions, SecurityMetrics requires that the website be fully PCI compliant.

Event Registration

- Online, real-time registration for Free and Pay-based events.
- Needs to link to the payment processor (Authorize.net).
- Picks up existing user information from user sign-in and pre-populates fields if applicable.
- Ability to create multiple “Registration Types” per event (for example members, non-members, table sponsor, etc), each registration type should be allowed to be tied to a permission system that lets different user types purchase that ticket type only if logged in (for example only logged-in members can buy member tickets; if they are not logged in, it must prompt them to do so first... but public tickets can be purchased without logging in).
- Links to register come from the Calendar of Events or from other sections (such as a news highlight) so that users can easily navigate to the appropriate registration page.
- Each registration type may allow administrators to create custom fields for each ticket type (in case additional information is required for just one type of registration on a single event... for example a sponsor table may need the names of the 8 attendees). This is an optional bid feature.
- Allows for multiple registrations in one order before checking out.
- Allows for registrant to select “options” on their registration of different items for an event (example: dinner, expo, presentation) [must be customizable per event registration type].
- Ties to social media for sharing by visitors.
- Each registrant (even if more than one on an order) should receive the details of the event emailed to them with their registration info.
- Administrators must be able to see a complete list of registrations in the admin panel with searchable/filterable and exportable list to Excel (that includes all the details of each registration)
- Since some members will request event sign-up by phone or pay for events by check, the capability for administrative users to manually edit and update the event record is required.

Calendar of Events

- Online listing of events, with links to event pages or descriptions.
- Needs allow for event registration.
- In its simplest format, it could be a list of events, with dates and summary info linking to more info. In more complex format, could be calendar with events highlighted.
- Needs to be able to have full WYSIWYG content control per event... allowing links to News and advertising processes, etc.
- Each event should be shareable via social media.

- Upcoming events should be able to be presented in a smaller module on the homepage (or other pages) that show just a few upcoming events at a time (and hiding events that have passed).

Online Payment Processing / Check Out

- A complete onsite commerce solution should be put in place using SSL (https) checkout procedures to process event registrations, CELAA merchandise, memberships (and renewals), and open invoice bill payments.
- All transactions should send email receipts to purchaser and notices to administrators.
- Administrative users should be able to see a list of all transactions with full details (less the secure/sensitive information).
- The accounting team requires that every order sent to the credit card processor contain complete breakdown of the order details for proper classification in the accounting system (i.e. receipts should show line item details not just totals).

Content Management System

- The back-end of the new website should include an easy-to-use administrative area that will allow designated users to update/add/delete content (new pages, text, images & files) throughout the website.
- The system should be robust, expandable and customized to the specific needs of the CELAA website.
- A robust permission system must be included that allows for multi-user management and access giving permissions for specific users to only be able to access, edit, or add items to specific areas (for example UserX may only add new calendar events but not change the content on the homepage, etc).

Member Directory

- Every member in the system should have a user account that lets them go into the system and update their information.
- This information should contain [at a minimum] a full name, industry, company, and flag to indicate if they are a mentor/reactor, etc (for the master directory). The current site also allows for a biography section: Full Name, Industry, Company Name, member/reactor/mentor, graduating year, areas of expertise, photo and contact information. In addition to the existing fields, a member type (Core, MWEE, Advanced, High Tech, Honorary) should be included.
- Edit capability should include checkboxes to allow/disallow a field from being made public to members.
- There should be a mechanism that alerts CEL Administrative staff to changes so that those changes can be verified.
- The directory should be fully searchable and sortable by industry, class year, name, company, and other relevant fields.
- From the list view of the directory, visitors should be able to click on the member to get more information if the member has offered additional content (like optional contact information, etc)
- A Class section should be available to congregate class-specific events as well as a class-specific email list separate from a member-wide email list.

Membership Registration / Renewal

- All graduates of the CEL core program that are eligible for membership should be able to register as such on the site.
- If they are a “New” member, their registration must be sent to a pending state so that the administrators can confirm their eligibility and approve them.
- Once they have a membership account, they may renew at anytime without waiting on approval.
- Each membership is for a rolling 1 year period and any early registration will simply tack on the extra year after their current year expires.
- If a member expires but does not renew, their user account must automatically fall into a “basic” user mode that lets them still log into the website but not access any of the “member only” features (basic and member are just two user types that should be configurable on what areas or functions they can have access to). These “expired” users should be prompted to renew their membership from all

places possible and immediately gain membership permission (without human interaction) once they successfully renew and pay online for their membership.

Additional Desired Items

These are desired options in order of lesser priority than the items specified above. Please consider including them with optional pricing. Overall costs and CELAA's available budget will determine how many of these items will be included in the initial website development.

Analytics / Webmaster Tools

- Full integration of Google Analytics (with funnels setup and commerce enabled).
- Utilize Google Webmaster tools and have them successfully connected to each other for webmaster analytics integration (a separate step).
- CELAA should own the Google account being used to administer these tools (not to be setup on a vendors gmail account).

News Management

- Administrators should be able to publish CELAA specific news easily.
- The homepage should automatically show a configurable amount of the most recent news..
- Each news article should be able to be categorized and searchable site wide.

Email Newsletter Opt-in / Opt-out

- The site should utilize a formal email "blast" tool (like Constant Contact or similar competitive product).
- Members should be able to opt in and out of mailings from inside their account [these opted users should be in a group in the mailing system called members]. Class-level accounts should also have opt-in/opt-out capability.
- There should also be a public registration on the open area of the site that lets visitors sign up for a mailing list group called "public". This will allow the organization to create consistent messages and choose to send to members only or the public (in the case of open event invites, etc) as desired.
- (As indicated under the Member Directory) email lists specific to each class and to all members should be available.
- The system should allow for scheduling of email blasts into the future.
- The mailing tool should also be fully CAN-SPAM federal law compliant.

Featured Items and Call Out Content

- The CMS could allow for small lists or featured items of content (like items from the news, events, and member lists etc) to be featured on the site with customized options (like how many to show, and where to show them) these "blocks" of highlighted items could be controllable by the administrators (without having to add additional programming). For example an administrator may be able to easily add a block on the homepage that contains the last 5 articles in the "Member News" category without having to have it "programmed" or "coded" into the homepage manually. This is optional.
- Graphic call-outs or pieces of static (fixed) content should be able to be placed easily across one or more pages in a simple way. (For example imagery, links, or blocks of text like a mission statement, etc)

Membership Management

- All members in the system should be controllable by the administrative staff. This includes the ability to create new members, disable or enable their accounts, change their user types or override their individual permissions and any other aspect of management required for the users and directory system.
- Administrators may be able to add, edit, and remove user types from the system and each user can have one OR more types attached to their user. This is an optional sub-feature.
- The system should be able to control what permissions each user type has (to protect areas of content, tools, etc)

Site Search

- Searches must be simple to use.
- The site should index all pages, news, events, and more so that a visitor can search on a term and find related items easily.
- Search should take into account the visitors access level meaning that if the user is not logged in, their search will not include “member only” pages but when a member is logged in, all the pages (public and member, etc) would be visible.

Social Media Integration

- Administrators should be able to tie in CELAA social accounts to the admin tools for publishing announcements and updates directly to pages/accounts through the social API's of each network... this should include Facebook, Twitter, and LinkedIn seamless publishing.
- From the front end (public site) visitors should be able to “Like” content and share it from pages to their own social networks.

Photo Galleries

- Administrators should be able to create a large number of image/photo galleries.
- Each gallery could have a “Cover Photo” but must have the ability to load any number of photos inside.
- The system will allow for simple uploading (preferably in bulk) with automatic resizing for optimal site loading. Visitors can then navigate through each gallery one-at-a-time or view them as a set of thumbnails and jump directly to each photo.

Sponsorship Advertising

- Administrators should be able to control advertising areas with the ability to create banner ads and have them automatically appear or disappear at pre-determined times (for example someone should just get a banner in the top position for July, it would automatically turn on July 1st and off at the end of July 31st).
- Multiple ads may share the same space and one would simply load randomly on a per page load.
- The same advertising mechanism should be used to create internal campaigns or advertisements driving visitors to events or other pages of content directly on the site if desired.

Varied Levels of Content Access

- Visitors can be set to require specific permissions to view or access specific content, pages, events, etc.
- This should be easily configurable and controlled by administrators. They may be able to create new user types and assign access to specific types of users or even just individual users directly (This is an optional sub-feature).
- Visitors that do not have access to specific content should not be able to see it in sitemaps, search results, any menu items, or other places automatically. If they attempt to go to restricted pages, they should be routed to a denial page or the home page.

Member to Member Discounts

- Logged in members should be able to post offers and discounts that appear on a member-only page that lists the details of their offer.
- Members can update, activate, disable or change this information at anytime within their account.

Member News

- Logged in members should be able to submit their own news or press. These items would not be mixed into the list of CELAA news but be in a separate area specific to member news.
- All news would be submitted in a pending state and an administrator would have to “approve” it before it would show in the member news section.

Job Openings Board

- Similar to the news system, members with access should be able to post job openings that they have.
- These job openings would require administrative approval before they show up.
- Once approved they would be public on the front end of the website to insure even the casual visitor and search engines could find and pick up the openings for hiring.
- Those interested job seekers would then be able to submit a full and formal resume that gets sent automatically via email to the job posting member.

Voting

- Ability for administrators to easily create polls or votes that can be sent to the members.
- This could be served by a third party if needed but may then lose the member-only capability (and dashboard integration) desired in some cases.

Restricted Publishing & Admin Access

- There should be different user types with access to the administrative tools as well. For example an intern may not be able to change the homepage (but could add a news article) or only the accounting people can see the commerce orders.
- This should be very robust and configurable on a component-by-component basis.

RSS Output and Feed Generation

- All news, member news, events, job openings, etc should be publishable to custom RSS feeds sent out by the site so that visitors can subscribe to them and get their information through feed readers or other RSS aggregation.
- What appears in these feeds should be assumed to only include the public access information and restricted items would be excluded.