255 South Champlain Street, Suite 11 • Burlington, Vermont 05401 • Phone: 802-862-8347

Request for Proposal: Website Redesign and Build

This Request for Proposal (RFP) seeks proposals from firms qualified to redesign and develop a CMS website for Vermont Businesses for Social Responsibility (VBSR). Please submit proposals to Jane Campbell, Executive Director at janec@vbsr.org by May 6, 2016. Questions may be submitted prior to April 8, 2016.

Contents

I. About VBSR

*VBSR is a **statewide, membership-based nonprofit business association** whose mission is "to foster a business ethic in Vermont that recognizes the opportunity and responsibility of the business community to set a high standard for protecting the natural, human, and economic environments of our citizens." Founded in 1990, with a current membership of almost 1,000 members, VBSR is the oldest and largest regional business association organized around principles of social responsibility.*

II. Project Goals

Our overall purpose is to replace the existing website, which has become antiquated in look, feel and functionality — with a new CMS website. Specific goals for the new site include:

1. *Better serve VBSR members (renewal process, event signups, job postings, news, case studies/reference, policies)*

2. *Reduce staff time necessary for membership, event and content updates*

3. *Empower VBSR staff to do more on the site independently*

4. *Get more targeted traffic (new member prospects and SR business education), and*

5. *Build an engaged community around VBSR issues and mission.*

III. Audiences

- *Current members and sponsors*

- *Potential members (VT businesses)*

- *Policymakers and influentials*

- *General public (Vermonters), including college students and recent graduates for the Internship Program*

IV. Current CMS Environment

Key elements of VBSR's current CMS environment and associated points of integration are listed here. For more detail and volume counts, please see Attachment A.

- *Website (vbsr.org) developed in/around 2006 using ExpressionEngine (EE) CMS (website currently hosted by EngineHosting.com)*

- *Credit Card processing provided by Burlington Bank Card with Authorize.net online payment gateway service.*
- *Website contains VBSR member directory, which is manually updated by uploading .csv files generated from a multi-user FileMaker Pro database (referred to internally as syncing)*
- *Website actively uses a combination of EE's FreeForm module and integrated third party forms from Google*
- *Member log-in area provides VBSR members ability to submit jobs and events, and update company directory listing*
- *Other online services actively used by VBSR (but not coordinated with the website) are Constant Contact, Eventbrite, and SurveyMonkey.*
- *Accounting is handled in QuickBooks, also not integrated with the website.*
- *There are currently two related domain names that redirect to subdirectories of the vbsr.org website. Both use customized WuFoo forms for e-commerce (Internvt.org and LocalFirstVermont.org).*

V. Timeline

Provide a schedule for when different steps in the process will take place.

For example:

- RFP sent March 16

- Letter of Interest due March 31

- Questions regarding RFP may be asked prior to April 8

- Response to Questions returned by April 22

- RFP due May 6, 2016

- RFP reviews with vendors May 16 - 27

- Final Decision May 31

- Website Launch August 31, 2016

VI. Examples of Website Feature or Design Preferences

*Examples of a few **business membership websites** that have design elements the VBSR staff like (and a few they don't) — and why.*

American Institute of Architects Vermont (http://www.aiavt.org/)

- *No need to scroll; information you want is immediately visible.*

American Sustainable Business Council (http://asbcouncil.org/)

- *Like: changing images on home page, clear navigation, integrated blog, calls-to-action, deep footer with site map/navigation. "Bright, clean, easy to use, interacts nicely with social media, feels modern."*

BALLE (https://bealocalist.org/about-us)

- *Like: Buttons/CTAs for four current priorities/events throughout the site (in the left sidebar on About page, but in the upper right of home page); changing images on home page (although changes too slowly and not obvious there are four different slides); latest blog posts and Twitter feed on home page.*
- *Dislike: colors and design*

Greater Akron Chamber (http://greaterakronchamber.org/)

- *Attractive and modern looking, but too much scrolling (up/down and sideways). Deep footer with site map/navigation good.*

Greater Westchester Chamber (http://greaterwestchester.com/)

- *Like: Buy Local app (and top nav); clear call-to-action area underneath changing images; member directory in top and footer nav.*

North Toronto Ski Club, Canada (https://ntsc.ca/)

- *Like: Large, full-width banner photo on home page; Unobtrusive but legible top navigation; Call-outs to highlight events on home page*

Portland (OR) Business Alliance (http://portlandalliance.com/)

- *"Not so aesthetically/visually appealing (a little bland), but it's clear where I need to go to get the information I need. Also like that greatest visibility is given to events and sections that get updated frequently - keeps it fresh."*

State Chamber (http://www.vtchamber.com/)

- *Dislike: Large banner ad at top; scrolling on home page annoying; main navigation lost under horizontal image slice; chopped up pages*

VII. Website Functionality Requirements

- **Content Management System (CMS)** - The website must be built on a content management system that allows for all areas of the site (webpages, images, blogs, forms, etc.) to be easily updated. We have identified Wild Apricot as the top all-in-one contender to meet this and the following functional requirements.

- **Responsive Design** - The website must be responsive, so that it seamlessly adjust to fit desktops, laptops, tablets and smartphones.

- **Search Engine Optimization (SEO) -** The CMS must include the ability to alter title tags, meta descriptions, alt tags, and headers. The site must be built to enable easy crawling by search engines.

- **Social media Integration -** The site should include the ability for web content to be shared to social media networks. The organization's social media networks must be linked to the website to allow for easy "follows."

- **Forms –** The website must include contact and listing forms. When a visitor fills out the form, the message must be sent to the correct staff member, or a new listing created. Ideally, Local First coupon forms will show a preview of the final coupon.

- **Association Membership Management —** The website must enable new member enrollment, provide company properties and contact properties, provide a login for areas restricted to members only, as well as enabling members to reset their password, update their information, open and close job postings, post events, and renew their membership.

- **VBSR Hosted Programs —** Local First Vermont must be able to maintain its current integration with third-party Local First software. Both Local First Vermont and the Vermont Intern Program must be able to maintain their current VBSR site integration and their current functionality (using Wufoo forms).

- **News and Blog –** The website must include a robust, built-in news/blog platform with subscription option (RSS/email). This must enable users to create, edit and publish news articles and/or blogs to the website, with a featured image. (Note there are multiple newsrooms/blogs.)

- **Hosting** – The website company must provide or recommend a hosting service with automated backups or equivalent.

- **Email Marketing** – The website company must provide email marketing capabilities that are seamless with the website and integrate with CAN-SPAM compliant email marketing software. The website company must provide one email template that is consistent with website design.

- **Event Registration and Marketing** — The website company must provide event registration and marketing capabilities that are seamless with the website and have the ability to integrate with existing systems.

- **Dynamic site map**: The site map should update dynamically.

- **Website Analytics –** Google Analytics tracking must be integrated on the site to allow for website visitor tracking, page tracking, etc.

- **Technical requirements** – The website must build web pages in HTML and CSS that meet W3C standards. No use of Flash. In addition to Section 508/ADA compliance, the website must be compliant with Mac and PC, as well as with the latest two versions of Internet Explorer, Mozilla Firefox, Chrome and Safari.

VIII. Project Scope of Work

All content, including images and multi-media files, will be supplied by VBSR.

- *Project plan and management*

- *Content strategy*

- *Visual design (desktop, tablet, mobile)*

- *Content migration, including image optimization for 50 pages/posts, to be determined*

- *Search engine optimization*

- *Front-end coding (HTML/CSS, animations)*

- *Back-end coding (CMS, 3rd party APIs, custom software/features)*

- *Testing & quality assurance*

- *Software & user training (6 users)*

- *Warranty period*

- *Ongoing site maintenance & security*

IX. Objectives and [Metrics of Success]

1. **Stimulate visits to new website** [Metric: Increase in number of web sessions and number of users in website traffic.] track +/- VT intern program

2. **Stimulate RETURN visits to website** [Metric: Number of Returning Visitor web sessions and average pages per session for repeat website traffic from xxx per year to yyy per year.] track +/- VT intern program

3. **Encourage New Member sign ups and Renewal Memberships via website** [Metric: Number of new member signups and renewal signups via web]

4. **Make it easy for visitors to understand and find general information on VBSR mission, initiatives, benefits of doing SR business in VT** [Metric: pageviews e.g., about us, news, policy page, resource links/pages]

5. **Engage visitors**, i.e., stickiness of VBSR website. [Metric: Increase in Average Session Duration and Average Pages Per Session]

6. **Increase number and percent of members posting or engaging** with VBSR via the website and social media, i.e., # jobs posted, # events posted, # [Metric: Establish baseline & then measure increase]

7. **Reduce website-to-database-to-accounting-to-email list etc. maintenance** and sync time necessary by staff [Metric: Staff time reports.]

X. Proposal Format

Vendors should provide the following information in their proposals:

1) Company Contact Information (website, mailing address)

2) Individual Contact Information (name, email, phone number of person submitting proposal)

3) VBSR website project team (detail whether one or more firms, names and role for each team member, specify employee versus contractor, work location by city/state for each)

4) Plan for accomplishing project goals, including your ability to provide required website functionality and your approach for the design.

5) Recommended CMS and rationale for its selection. (*We are attracted to Wild Apricot as an all-in-one solution for membership associations* and we know of specific membership sites we like that are on Drupal and WordPress CMS platforms.)

6) Pricing, by development stage, for delivering the specified website functionality

7) Examples of past work that is similar to this project

8) References (3 or more, from similar companies/organizations)

9) Development timeline and milestones

10) Signed Livable Wage Statement of Compliance

11) Signed indication as to whether company is a current VBSR member

12) Signed statement of commitment to socially responsible business practices and values

Attachment A: Details on current software, email, users and volumes

Item	Numbers	Notes
Database records	7,000	Includes individual contacts in 3,210 businesses, organizations, agencies
Mailings a month	1 to entire database + 2-3 emails/week to various segments, for example current members, public policy committee, board members and so forth	
Current members	763	March 2016
Other software used:	Constant Contact Eventbrite QuickBooks Pro Filemaker Pro 11 AZ Local First software w/ coupons Wufoo (5 users, unlimited forms) SurveyMonkey (unlimited) Sched	Nonprofit rate, $120/month Per transaction fees ? 8 licenses 1-time purchase $259/year $250/yr $200/yr

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Attachment B: Google Analytics Overview
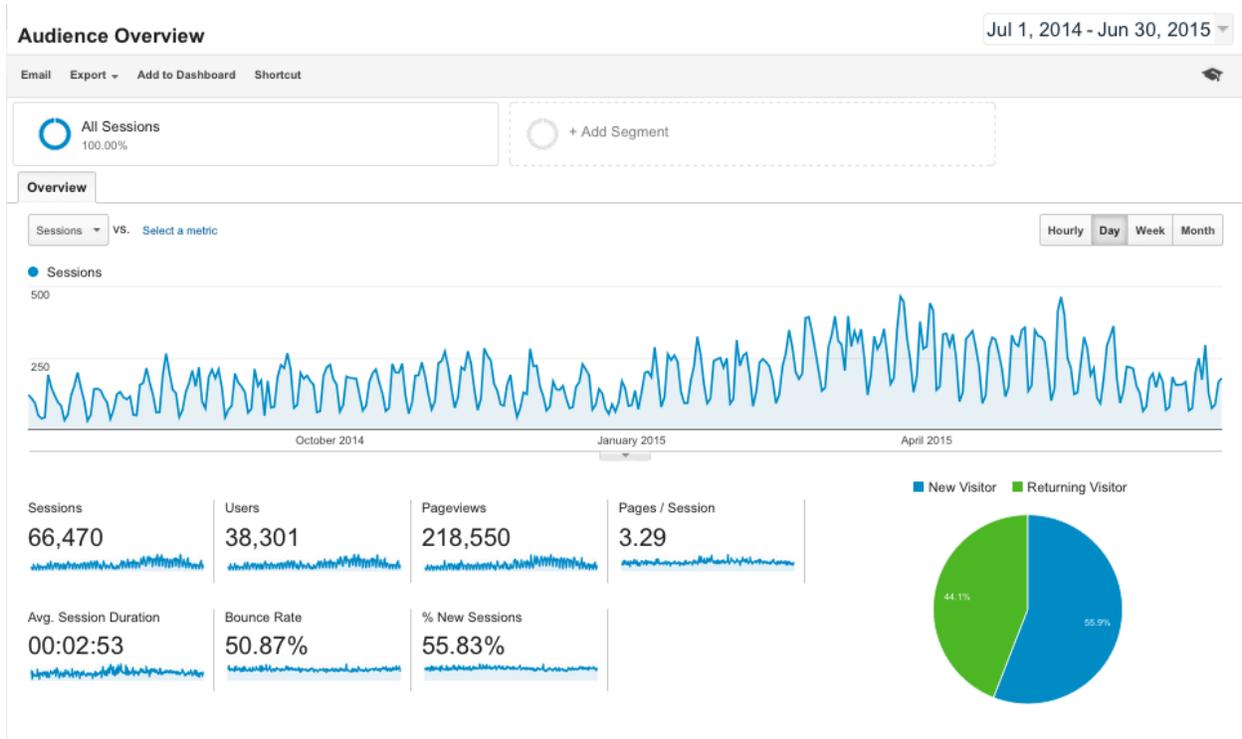
Attachment C: Weighted list of appealing features in Wild Apricot

VBSR Team priorities 5/29/15

Membership Management Software Selection Guide
Feature Comparison Matrix

Category	Functionality	Evaluation criteria ideas	Importance	Package 1 name e.g. Wild Apricot	Package 2 name e.g. Other	Package 3 name e.g. Another
Website/CMS						
	Website design templates	Variety and quality of out-of-the-box templates	4			
	Basic customization capabilities	What's available and how easy to use by non-technical users	9			
	Advanced customization capabilities	For professional web designers - HTML, CSS, JavaScript	9			
	SEO friendliness of the CMS system	e.g. ability to customize meta-tags per page, ability to use custom URLs for web pages	10			
	Web pages with restricted access	e.g. for premium member content, internal materials for the board	10			
	Text search	Built-in or via third-party service. Search quality and speed	8			
	Table editor	Ability to insert, edit and format tables	3			
	Page layouts	Variety, flexibility, customization of layouts	10			
	Content safety tools	Drafts, backups, restores and undoes	9			
	Picture and document management	How easy to upload, limits on numbers/sizes, organization into folders	10			
	Blog module	Categories, archiving, robust commenting	9			
	News module		9			
	Classifieds module					
	Job ads module					
	Online member directory module	Integrated with member database, search capabilities, customization options	10 *			
	Ad management	Built-in or via third-party like Google AdWords	4			
	Web analytics	Built-in or via third-party services like Google Analytics	10			
	Integration capabilities	Specific to your needs, e.g. single sign-on, Facebook Connect	0			
Contact database and membership management						
	Importing your current list	Self-service or paid service, how easy/time-consuming, what formats	10			
	Customization of member database	Ability to add custom data fields, multiple membership levels, different views and dashboards	10			
	Support for linked/hierarchical records	e.g. organization/employees, household/family members, team/players	5			
	Integrated contact database	Integrated view of all contact interactions and transactions - membership, event registrations, donations, communications	8			
	Quick search	Ability to quickly look up a particular record	9			
	Advanced search	To select specific records by precise search criteria	9			
	Workflow for new membership applications	Payment, approval, confirmations, admin notifications	9			
	Automation of renewals	e.g. email reminders to member and admin, automatic record updates, automatic withdrawals	10			
	Manual processing of membership transactions	Adding new membership records, updating existing, recording renewals, entering check payments	10			
	Mail-merge function for members/contacts	To create member certificates/cards/letters/emails	6			
	Member profile pages/mini-sites	Public-facing member profiles	9			
	Privacy controls	For public-facing member profiles, email subscriptions, etc.	9			
	Online member self-service	To update member record, renew, view and reprint invoices, etc.	10			
	Audit log	For member record updates, financial transactions	9			
	Membership reports	Income reports, new applications, renewals	10	**0**		
Event registration						
	Event calendar	Weekly/monthly/yearly/list views, multiple calendars	10			
	Automatic event notices and reminders	Selecting recipients, timing, customizing text	7			
	Registration confirmations and receipts	Automatically emailed/displayed online	10			
	Online event registration form	Customization of fields	9			
	Multiple registrations in one transaction	Registering multiple people at once or same person for multiple events	9			

Reflects → replacing current DB w/ integrated website + DB system

* no third party ads

** would be 0 if we keep current DB (would still need to be integrated w/ website as it is now)

We can easily use Eventbrite but it's nice to have integrated if it doesn't create a limitation

	RSVP	Yes/No/maybe, process simplicity	9			
	Pricing flexibility	Public/members, time-based, discount coupons, dynamic based on selection	10			
	Registration limits	Per event, per event session, per ticket type, waitlists	10			
	Workflow for incomplete registrations	Retrying payment, cleaning up abandoned registrations	8			
	Tracking registrations	Online list and reports, email notifications	9			
	Publish list of attendees	Including privacy controls	10			
	Attendance tracking	On-site or after-fact tracking of actual attendance	10			
	Manual processing of event transactions	Recording event registrations, updating existing, recording payments, entering corrections	10			
	Event reports	Per-event, across events. Financial reports, specific event selections	10			
Newsletter / email blast						
	Subscription and opt-in/opt-out process		10			
	Design templates	Availability and variety of layout/design templates	10			
	Rich content and customization of emails		10			
	Ability to select recipients by precise criteria		10			
	Ability to manually select specific recipients		10			
	Tracking open emails and link click-through		10			
	Management of bounced emails	Tracking and automatic removal of bounces	10			
Fundraising						
	Create and customize online donation form	Add/change fields, adjust required fields, pre-set donation amounts	2			
	Email confirmation	Customization of thank-you emails	2			
	Donation reporting	Reporting for date ranges, campaigns, donors	2			
	Tracking of offline donations	Ability to track fundraising done outside of online channel	2			
Community and social networking						
	Friends	People can request to become 'friends'. Separate privacy settings for friends.	0			
	News/activity feeds	Updates about friends' actions, ratings	0			
	Person-to-person messaging	Instant chat or asynchronous	0			
	Photo galleries/albums	Personal albums, shared albums, slideshows	0			
	Discussion forums	Including moderation capabilities, email notifications	0			
	Groups	Who can create groups, how join process is controlled	0			
General						
	Multi-chapter functionality	Separate chapter sites or pages, per-chapter member management	0			
	Video hosting capabilities	Embed third-party or host	0			
	Audio hosting capabilities	Embed third-party or host	0			
	Managing site administrators	How many, customized access				
	Compatibility	Operating systems (e.g. Windows, Mac, Linux), browsers (Internet Explorer, Firefox, Safari, etc.)	10			
	Online payment integration	Selection of payment processors, transaction fees	10			
	Integration with other websites	Has to be defined very precisely - blog feeds, Facebook Connect, single sign-on, etc.	8			
	Affiliate integration	If you want to use affiliate programs to drive memberships or event registrations	8			
	Export	Ability to export any data at any moment	10 ***			
		SUITABLITY SCORE OF PACKAGE:	#DIV/0!	#DIV/0!	#DIV/0!	

Handwritten note (left margin): We can easily use Constant Contact, but it would be nice to have it integrated if it doesn't create a limitation

Handwritten note (bottom): *** if we keep current DB

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Attachment E: Preliminary Site Map

Social Media Sharing Buttons

Member Log-in

**Vermont Businesses
for Social Responsibility
www.vbsr.org/**

Contact Us

Search

About VBSR
- What We Do
- Meet the Board
- Meet the Staff
- HIstory
- Bylaws
- Privacy Policy
- Contact Us

Members
- Membership Information
  + 4 sub-pages
- Member Benefits
  + 5 sub-pages
- Member Directory
  + 1 sub-pages
- Job Listings
- Get Involved!

Programs & Partners
- Education
- VT Intern Program
  + 6 sub-pages
- Workplace Quality
- Business Energy Action
- VBSR Marketplace
- Quick Impact Assessment
- Local First
- Terry Ehrich Award

News
- VBSR Monthly eNews
  - email
  - email
  - email
- Members in the News
  - Post
  - Post
  - Post
- VBSR in the News
  - Post
  - Post
  - Post
- The Vermont Conversation

Events
- Event Calendar
- Member Events
  - Post
  - Post
  - Post
- Manage Events
- Events Archive
  - Post
  - Post
  - Post

Public Policy
- Issues
  + 5 sub-pages
- Postition Papers
  - Post
  - Post
  - Post
- Public Policy Blog
  - Post
  - Post
  - Post

Legend
Home Page	
1st level Navigation	
2nd level Navigation	
Blog Articles / posts	
email newsetter as page	
Every-page Item	

Social Media Follow Buttons