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October 1, 2019

California State PTA (CAPTA) is seeking proposals to develop an online searchable resource hub located at capta.org. This new resource hub will assist parents in finding family friendly information about how to get more involved in their child's learning experience.

We are seeking a consultant(s) with experience developing applications for WordPress-based websites. This Request for Proposal (RFP) contains information about the organization and services required.

Proposals will be evaluated by the following criteria:

- Completeness of the plan** – Does the consultant have the ability to achieve intended outcomes in a timely and cost effective manner?
- Experience** – Does the consultant or consultant agency have a track record of producing quality work in a timely and cost-effective manner?
- Current and Forward-Looking** – Does the consultant agency have a demonstrated understanding of intended outcomes?

The specifications of the request for proposal are attached. An electronic copy of your proposal must be received at the California State PTA office by Tuesday, November 12, 2019 and should be delivered to ccadwallader@capta.org. Hard-copy proposals are welcome, but will not be considered an official submission.

At the sole discretion of California State PTA, selected bidders may be invited to make oral and visual presentations to an evaluation committee after submission of proposal. Presentations will be only with California State PTA representatives and key representative of invited companies. Presenters will be allowed a minimum of five days' notice to prepare.

Sincerely,

Sherry Skelly Griffith  
Executive Director

## **GENERAL INFORMATION**

This Request for Proposal (RFP) is not a commitment or contract of any kind. California State PTA (CAPTA) reserves the right to pursue any and/or all ideas generated by this request. Costs of developing the proposals are entirely the responsibility of the applicants and shall not be reimbursed. California State PTA reserves the right to reject any and all proposals and/or terminate the RFP process if deemed in the best interest of California State PTA. Further, while every effort has been made to ensure the information presented in this RFP is accurate and thorough, California State PTA assumes no liability for any unintentional errors or omissions in this document. California State PTA reserves the right to waive any requirements listed in the RFP when it determines that waiving a requirement is in the best interest of California State PTA.

### Project Objective

To develop a new system on our current WordPress-based website at CAPTA.org to facilitate the submission, review, approval, management, and searching of educational resources.

### Background

In November 2018, the California State Board of Education adopted instructional materials to support implementation of the Next Generation Science Standards (NGSS). In light of this, every school and school district in the state ought to be actively transitioning to the new standards. Parents can play an important role in advocating for and supporting this transition and California State PTA is poised to provide education stakeholders with insights into how to help make that happen.

A vital element of PTA's work is to dramatically increase the knowledge and capacity of parents and parent leaders throughout the state in a broad, scalable way. By doing so, we strengthen our overall advocacy efforts to ensure all students are prepared for college, careers and civic life and that parents and families are speaking up in support of a full curriculum and Next Generation Science Standards.

To get engaged in a topic such as science standards and instruction, parents need information that is clear and accessible, and that taps into their concerns about their own children's future. California State PTA is uniquely positioned to develop and disseminate that kind of information about NGSS and the instructional shifts it calls for. Our statewide network enables us to effectively connect and communicate with parents at the school and district level. In addition, our trusted relationships with other statewide education organizations give us the opportunity to share those messages with educators and other parent-focused organizations throughout California.

CAPTA received a grant to support these efforts from the S.D. Bechtel Foundation and one grant deliverable that will have a far reaching return on investment is to provide local PTA units with easy-to-access, relatable, and trustworthy information about science activities and resources available to them by developing and launching an online knowledge hub of state, regional and local NGSS resources.

## Requirements

The winning bidder will:

- Submit an RFP that clearly outlines the project and meets the budget requirements.
- Propose a solid testing period in which volunteers and staff will be able to test the tool.
- Provide opportunities for collaboration with volunteers/staff.
- Provide a timeline allowing for a March 14, 2020 launch coinciding with Science Education Day.

## **SCOPE OF WORK**

1. Outline the best approach to building an online searchable database that holds parent resources uploaded by staff and volunteers.
2. Share approach with volunteer leaders and seek feedback.
3. Use volunteer leader feedback and requirements to ensure the tool meets the needs of volunteer leaders to ensure its use.
4. Build the online searchable database on [capta.org](http://capta.org) and have volunteer leaders test it prior to launch day.
5. Launch the new tool on Science Education Day, March 14, 2020.

## FUNCTIONAL REQUIREMENTS

### User Groups

The system will be used by the following authenticated user groups:

- Board of Directors (15 people) Users in this group might be granted exclusive access to other site content in the future.
- Board of Managers (approximately 100 people)
- Curators (several individuals who will also be on the Board of Managers) This role would grant the user the ability to moderate submitted resources. Curators will belong to one or more commissions, and their commission assignments will determine which resources they can moderate.

...and the published resources will be available to everyone visiting the website (usually parents across the state).

*(Please note that the current login at <https://capta.org/login/state-board/> is custom built and uses a single username/password for all users.)*

## System Flow

### *Submission*

Users on the Board of Managers will log in and submit a resource for review. A resource will consist of:

- a title,
- a brief description,
- category (or categories)
- tags (created or selected from an existing list of tags),
- a featured image
- a URL to the resource (usually on a third-party website)
- Commission to submit resource to for moderation (radio style, pick one only choice from approximately eight different commissions. E.g: leadership, education, membership; communication; legislation; health & community concerns; family engagement; special events.
- Other as defined by leadership (geographic, grade level, domain)

### *Review*

The curator (or curators) assigned to a particular commission will receive an email notifying them that a submission of a resource for that commission has been made and is awaiting review. They should also be able to log in and see a list of submitted resources for the commissions they belong to that are awaiting review.

The curator will be able to view a submitted resource, to include following the supplied URL to the third-party website where they can review it:

During review, the curator will be able to add or remove categories and tags for the resource and to set an optional archive date.

The resource will likely also need to have the description edited and to have an excerpt added.

If the resource was not submitted to the correct commission, the curator can reassign the submission to a different commission, sending the curator(s) assigned to that commission a new notification email.

### *Approval and Publishing*

The curator will be able to publish the approved resource, or save their changes in draft format and submit the resource to a website editor for final polishing (e.g., HTML tasks that are outside the curators comfort zone) and publication.

### *Management / Archiving*

The curator will also be able to edit, unpublish or delete a resource for their commission at any time. If an archive date has been set for a resource, it will automatically unpublish at the specified date/time. Curators will not be able to edit, unpublish or delete resources that are not assigned to their commission(s).

### *Browsing and Viewing*

Published resources will be available to all website visitors (potentially in CAPTA.org's Resources section at <https://capta.org/resources/>). Visitors will be able to search the resources, or filter resources by category or by tag. The search interface should enable an “advanced” search on multiple criteria (e.g. “show me resources for the education commission that contain the keyword “kindergarten”).

The interface should order the search results in a way that makes them easy to browse and navigate through.

*(Please note that decisions about where the resources reside is a decision that CAPTA's Volunteer Leaders will make based upon recommendations by the consultant.)*

### Project Team

- Colleen Cadwallader, Project Lead, Director of Programs and Grant Development
- Ignacio Barragan, Assistant Executive Director
- Vi Le, Technology Systems Specialist
- CAPTA Board President
- Volunteer Leaders

### CURRENT SYSTEM SPECIFICATIONS

The system must be developed and integrated into CAPTA.org's current website. The website is currently running:

- WordPress 5.2.2
- Custom theme (CA PTA 2015)
- Plugins (all activated plugins are up to date)
- Advanced Custom Fields PRO
- Akismet Anti-Spam (inactive)
- Better Click to Tweet
- capta.org options (custom CA PTA plugin to add options to configure capta.org's general settings)
- capta.org pages activity (custom CA PTA plugin to add see pages activity in the dashboard)
- capta.org search (A custom Google CSE plugin for capta.org.)
- Formstack Plugin
- Gutenberg Ramp
- MCE Table Buttons
- Page Links To
- PHP Compatibility Checker
- Share This Share Buttons
- Toolset Types
- WooCommerce (inactive)
- Woody ad snippets
- WP Bitly

The site is hosted at WP Engine (WPEngine.com), running the following:

- PHP 7.3
- phpMyAdmin

A staging copy of the current website will be made so the developer can develop the new system in the staging environment. The staging site will not remain synched with the live website, and so the changes will need to be installed on the live site once they're completed, tested and approved.

#### *Additional specifications*

- The site has 31 published posts across 8 categories
- The site has 8 custom post types:
  - Council PTAs (31 published)
  - District PTAs (25 published)
  - Local PTAs (179 published, 25 drafts)
  - People (15 published; used to display the Board of Directors)
  - Resources (189 published, 111 drafts) – see additional note below.
  - School Districts (4 published, including 1 test)
  - Stakeholders (2 published, including 1 test; used to assign current login username / password)
  - Training Center Videos (13 videos)
- The site has 288 published pages
- The site averages 2,492 visitors per day
- The site uses an average of 2.29GB per day in bandwidth
- The site has 706mb of total storage

The current resources on the site (see <https://capta.org/resources/>) are developed with Toolset Types as a custom post type. The Resources landing page utilizes a custom page template which parses the Resources posts.

### **BUDGET**

The proposed budget for this project must fall within the range of \$12,500 – \$15,000.

### **INITIAL TIMELINES**

- RFP released - October 1, 2019
- Bidders' Conference Call - Friday, October 18, 2019 4:00-5:00pm
  - Dial-in Number: (712) 775-7300
  - Participant Access Code: 960878#
- Deadline for Submission - Tuesday, November 12, 2019
- Award Contract - December 1, 2019
- Implementation and Development Phase - December 1, 2019 – March 15, 2020
- Volunteer Leader Listening Session - January 10, 2020 (tentative)
- Beta Testing March 1 - March 13, 2020
- Launch Date March 14, 2020

## **BACKGROUND INFORMATION**

California State PTA is a 501(c) 3 organization and its corporate headquarters is located in Sacramento. In addition to a staff of 19 in Sacramento, board members, committee members and others transact business primarily via telephone, email and website access.

California PTA is a leader in providing parents, schools and districts with tools to engage in meaningful partnership and decision-making to improve outcomes for all children.

We are part of the foundation of the California public-education system and a trusted messenger to millions of members, parents, families, educators and allied agencies throughout the state. We are part of National PTA, the nation's largest volunteer-led child-advocacy association working to drive improvements in the education, health and well-being of all children and families.

Parents are children's first teachers and we believe that parent involvement is essential throughout a child's educational experience. We believe that family is the basic unit of society responsible for the support and nurturing of all children, and we recognize that "the family" may be defined in many ways. We believe our responsibility includes advocating for the safety and welfare of all children and the opportunity for a quality public education for each child.

A Board of Directors and Board of Managers govern California State PTA. The Board of Directors consists of elected and appointed officers and meets four times a year to conduct the business of the organization. The Board of Managers consists of 110 members, including the district presidents, and meets four times a year to coordinate California State PTA's statewide programs as well as conduct the business of the organization.

### Mission and Goals

The mission of California State PTA is to positively impact the lives of all children and families.

#### *PTA Goals*

- Advocate for the education, health, safety and well-being of all children
- Inform, engage and empower our members and the public on issues concerning children and families
- Mentor the leaders of tomorrow
- Promote, practice and embrace inclusiveness
- Promote and build family engagement to foster positive outcomes for every child
- Strengthen our voice for all children by increasing membership

## **RFP COMMUNICATIONS**

### **California State PTA Contact**

The contact person for this procurement process is:

Colleen Cadwallader  
California State PTA  
2327 L Street  
Sacramento, CA 95816-5014  
(916) 440-1985 ext. 119

Questions must be submitted via email to [ccadwallader@capta.org](mailto:ccadwallader@capta.org) by October 17, 2019 to ensure sufficient time to prepare responses.

### Contractor Responsibilities

The individual representative of the contractor who has contracting authority must sign each proposal. That individual will be the sole point of contact with regard to contractual matters. Vendors must certify that they are not currently under suspension by the State of California, any other state, regulatory commission, or the federal government. Vendors must acknowledge that, if they are currently under suspension, or if they owe delinquent taxes, their proposal may not be accepted or considered.

### Rejection of Proposals

California State PTA reserves the right to reject any and all proposals received as a result of this request, or to renegotiate with any and all competing vendors. California State PTA also reserves the right to certify the top vendor by on-site visit of California State PTA representatives.

### Disclosure of Proposal Contents

Proprietary and price information provided in your proposal will be held in confidence to the best of California State PTA's ability under the applicable laws of the State of California. Unsuccessful proposals will not be revealed or discussed with competitors.

### Contract

It is California State PTA's intent to enter into one-time contract as a result of this RFP. It is proposed that, if a contract is entered into as a result of successful negotiations, the selected company will be required to sign a contract confirming specific terms, conditions, and fees, consistent with the proposal. The project will not commence until an agreement is signed which outlines the scope of all work, budget, terms and all necessary items.



## **PROPOSAL FORMAT**

These instructions describe the required format for the RFP. RFPs submitted shall follow the format as described below, shall not exceed 10 pages and shall not use fonts smaller than 10 point. All pages shall be sequentially numbered. All materials submitted in response to this RFP shall become the property of California State PTA and will be returned only at California State PTA's option.

Consultants shall submit a copy of their proposal to the email address identified. An electronic copy of your proposal must be received at the California State PTA office by November 12, 2019 and should be delivered to [ccadwallader@capta.org](mailto:ccadwallader@capta.org). Hard-copy proposals are welcome, but will not be considered an official submission.

Each copy shall contain the following documents:

- Cover Letter/Executive Summary
- Company Profile (See Attachment A)
- Professional Qualifications and Experience (See Attachment B)
- Relevant Examples (See Attachment C)
- Services and Cost Proposal for Phase 1 (See Attachment D)
- Timeline

### Cover Letter/Executive Summary

The cover letter/executive summary shall be in the form of a standard business letter and shall be signed by an individual authorized to legally bind the company. The cover letter/executive summary shall provide the name and telephone number of a contact person with authority to answer questions regarding the proposal. The letter shall also include the name, telephone number and email address of a contact to be notified regarding contractual issues. The letter should clearly communicate the company's understanding of California State PTA's objectives and the scope of services required in this RFP.

**Attachment A**

## COMPANY PROFILE

<b>Item</b>	<b>Description</b>
A-1	Name of Company
A-2	Address of Company (principal place of business)
A-3	Telephone number
A-4	Date established
A-5	Size of company (including the number of FTE employees)
A-6	The location of the primary office and ancillary offices that will provide services for California State PTA
A-7	Signature of an authorized officer or agent of the company submitting the proposal

**Attachment B**

## PROFESSIONAL QUALIFICATIONS AND EXPERIENCE

<b>Item</b>	<b>Description</b>
B-1	Identify the individuals who will work on the project and the roles they will play
B-2	Describe your team's experience with nonprofit organizations
B-3	Describe your organization's experience in developing a tool such as the one outlined in this RFP
B-4	Include three (3) specific references that we may contact

## Attachment C

### RELEVANT EXAMPLES

Item	Description
C-1	Provide at least three (3) examples of web tools your agency has developed which are most relevant to the proposed work for California State PTA
C-2	Include a brief strategic background summary of each example to include the company's role in the design and development of the project, not to exceed 400 words or one page

## Attachment D

### SERVICES AND COST PROPOSAL

Item	Description
C-1	Outline the company's approach to this project
C-2	Describe and outline the time frame for each phase as provided in the scope of Phase 1 of the project
C-4	Provide a cost proposal to include all planning, development and any other elements necessary for the project completion. The costs quoted must be all- inclusive; anticipated additional costs should be itemized and called out in an exhibit or schedule  Bidders are encouraged to suggest efficiencies and cost savings advantages to the California State PTA.  Proposals shall be valid for a minimum of ninety calendar days from submittal.
C-5	Terms and conditions, and other supporting information shall be included in the cost proposal