



NCAIED
REQUEST FOR PROPOSAL
to provide
INFORMATION TECHNOLOGY CONSULTING SERVICES
(CRM/CMS, DATABASE, WEBSITES, E-COMMERCE)

Issued: November 12, 2010

Due Date: December 3, 2010

4 p.m. (Pacific Standard Time)

Project Completion Date: February 28, 2011

4 p.m. (Pacific Standard Time)

Submit completed application to:

NCAIED
953 E. Juanita Ave
Mesa, AZ 85204
Phone: (480) 545-1298
Fax: (480) 545-4208
www.ncaied.org

Application Instructions and Administrative Requirements

ISSUING AGENCY

This Request for Proposal (RFP) is issued by the National Center for American Indian Enterprise Development, AZ, subsequently referred to as "NCAIED".

I.T. SERVICES REQUEST FOR PROPOSAL (RFP) SPECIFICATIONS

To contract with the National Center for American Indian Enterprise Development, applicants must be an established legal entity, which includes possessing a Federal Tax Identification Number, as required by IRS regulations.

PROJECTSCHEDULE

The following Time Table will be utilized for the awarding of a contract for the NCAIED IT Consulting Services and Support:

Proposal Application Available	November 15, 2010
RFP Applicant's Inquiries Due	November 19, 2010 by 4:00 p.m.
Answers to Applicant's Inquiries Released	November 26, 2010
<u>Deadline for Submission of RFP</u>	<u>December 3, 2010 4:00 p.m.</u>
Evaluation of Proposals Completed	December 10, 2010
Notification of Intent to Contract	December 15, 2010
Contract Award Recommended to NCAIED Board	December 22, 2009
Contract Services Begin	January 3, 2010

GENERAL INSTRUCTIONS

Applicant's Inquiries

All applicants' inquiries are due on November 19, 2010 by 4:00 p.m. Questions may be sent via email to: ncaied@ncaied.org The deadline for Submissions is December 3, 2010. No inquiries, written or oral, will be accepted after this date.

NCAIED reserves the right to reject any and all proposals and to waive irregularities and informalities in the submittal and evaluation process. This RFP does not obligate NCAIED to pay any costs incurred by respondents in the preparation and submission of a proposal. Furthermore, the RFP does not obligate NCAIED to accept or contract for any expressed or implied services.

The successful vendor must comply with NCAIED equal opportunity requirements. NCAIED is committed to a program of equal employment opportunity regardless of race, color, creed, sex, age, nationality or disability. NCAIED does exercise Native American Indian preference in determining the award of the contract.

INTRODUCTION

NCAIED is requesting proposals for Information Technology Services related to the NCAIED and NativeEDGE websites and the incorporation of a CRM/CMS (Customer Relationship Management /Content Management System).

Major elements of development will be in these areas:

- Analyze existing data communication technology of the organization
- Determine communication data integration and aggregation requirements and recommendation
- Website development of NCAIED and NativeEDGE
- Tracking methods and functions requirement and recommendations
- NCAIED Program requirements and recommendations
- Processes of data communication
- E-commerce requirement and recommendations
- Membership requirements and recommendations
- Membership tools requirement and recommendations
- CRM requirement and recommendations
- CMS requirement and recommendations
- Dynamic Data requirement and recommendations
- Desktop application for viewing data metrics requirement and recommendations
- RSS feeds requirement and recommendations
- Calendar requirement and recommendations
- Control Panel for administration requirement and recommendations
- Administration requirement and recommendations

FOCUS OF PROJECT

The focus of the project is to revise the current sites and integrate both the NCAIED and NativeEDGE websites utilizing a CRM/CMS database to tie both sites together. The sites will reflect a professional business "One stop shop" for doing business with Indian Country business owners.

The new sites will offer enhanced capabilities as outlined above. The sites will implement a CRM/CMS backend system with data from the CRM database being utilized on both sites in a variety of ways to better serve users of the site and NCAIED staff. The CRM database will be capable of allowing each user type to maintain and update data within a common framework.

The hosting of the NCAIED and NativeEDGE websites and CRM services will be housed in one hosting location to simplify administration. The current NCAIED websites are hosted by an Internet Service Provider (ISP) and maintained by NCAIED I.T. staff. The new sites will be maintained in the same manner with the use of a new central control panel with enhanced administration capabilities. Data from the new CRM/CMS will be utilized to track relations and progress as outlined in the requirements section of this document.

The intention is to offer a new interactive and dynamic data resource optimized for performance and to be utilized as the go to resource for all Native American Indian business ventures. The new sites will be engaging and optimized for usability to all users of the system.

DEMONSTRATION OF PRODUCTS

At the option of NCAIED, and as a condition prior to selection, respondents may be required to demonstrate the functionality of the proposed system. The demonstration must be conducted with the products proposed and must be able to demonstrate the functionality as it would be implemented for NCAIED websites and CRM/CMS system. If NCAIED elects to have a demonstration, the respondent may be required to do so at the NCAIED Mesa, AZ. office facility. Failure to agree to the demonstration will disqualify the responder. A minimum expectation of respondents to this RFP will be web/conference call presentations to multiple groups of NCAIED department heads and staff. It is understood that any costs for on-site or web/conference call demonstrations shall be the sole responsibility of the respondents.

TECHNICAL INFRASTRUCTURE

One of the areas of consideration for evaluating proposals will be compatibility with the NCAIED Information Technology infrastructure. That infrastructure currently includes the following:

- Windows Server 2003/2008 network operating system for file and print services and ISP hosted email services.
- All workstations accessing the network must do so using a LAN, WAN and remote access.
- Microsoft Windows XP/ Microsoft Windows Vista/ Microsoft Windows 7 workstation operating systems.
- Microsoft Office 2003/2007/2010 for PC productivity suites.
- Internet Explorer 8 for default browser.
- Internal application development standard: MySQL, PHP, JavaScripts, ActionScripts, XHTML.

MINIMUM REQUIREMENTS

Proposed website/system/applications must meet the following minimum requirements:

- Respondent currently provides website services to established businesses with an active website for reference.
- Public access to all of the features on the website is not dependent on one specific browser, that is, the web interface is not browser specific and will work with all commonly used web browsers found on Windows, Linux and Mac computer systems.
- Website capable of being organized into multiple categories and departments within NCAIED organization with ability for NCAIED website administration to add and edit categories.
- Intuitive and consistent options for navigating the website especially moving from the NCAIED website to the NativeEDGE website and the CRM database.
- Multiple level security, completely contained within the website infrastructure, and
- not reliant on the existing NCAIED network security or peer-to-peer connectivity.
- Flexibility within the portion of the site assigned to a department or function for designated staff to add, remove and update content using tools and templates that do not require extensive knowledge of web development languages or technical structure.
- Pages and features compatible with limited bandwidth access by the public depending upon level access. In other words, NCAIED is concerned with public access being hindered by a digital divide and content should be available to all no matter the bandwidth speed or browser type.
- Web interface options that can accommodate individuals with disabilities in accordance with the American with Disabilities Act (ADA).
- Capability of the general website administration staff to:
 - Control size of individual web pages.
 - Control size and types of images used within the site.
 - Control publishing of links to other websites.
 - Report website maintenance activity and statistics on content type: Updates, downloadable documents, web pages, calendars.
 - Report number of visits to site generally and to each department.
- Provides 128-bit encryption over Secure Socket Layer (SSL) for displaying CRM data and is specific to user level web pages and for information transmitted to and from the website by NCAIED staff and users of the site.
- Email interfaces, if any, are not dependent on a specific email client.

- Respondents proposing to host NCAIED website must not be on any email or website “black lists” as a source of unwanted solicitations or objectionable content.

FEATURES & CAPABILITIES

The following is a list of additional features and capabilities NCAIED is seeking in website and CRM services. The list is not intended to be all inclusive, nor is it intended to represent a minimum of features and capabilities.

- Capability for easily searching the website for key words or phrases.
- Mechanism for members of the public to convey comments, suggestions or questions concerning the website design or information.
- Content management system (CMS) that provides for a database of information common to all NCAIED departments per user levels and access.
- CMS that provides a uniform means of managing web documents whether posted as web pages or downloadable files. Database needs to include items like the document/page title, description, posting information, expiration date, owner of the document, last modification.
- Meeting/event calendar system that allows for each department to add content to a department specific calendar that appears in the department's portion of the website and that maintains a composite calendar of all NCAIED departments.
- Ability to upload data into preformatted web pages or document locations, for example, word type document to PDF and resizing of images to fit into specific element spaces.
- Allow creation of functional groupings of web pages or portions of web pages from multiple departments in order to facilitate public access to information that crosses departmental lines.
- Option for creation and maintenance of multiple blogs both restricted within a department's portion of the website or made available generally while hosted by a specific department.
- Allow authorized staff that maintain a specific department's web pages to make some pages available only to visitors with user names and passwords supplied by the department.

- **Analysis:**

- NCAIED.org
- NativeEDGE.org
- CRM/Database
- Information Technology infrastructure

- **Determination:**

- Determine NCAIED Management requirements/recommendations.
- Determine NCAIED Staff requirements/recommendations.
- Determine NCAIED Program Manager/Consultant requirements/recommendations.
- Determine NCAIED Program Client requirements/recommendations.
- Determine NCAIED Membership requirements/recommendations.
- Determine NCAIED Resource Council (RC) requirements/recommendations.
- Determine NCAIED Technical requirements/recommendations.
- Determine NCAIED CRM Requirements/recommendations.
- Determine NCAIED Database requirements/recommendations.
- Determine Hosting requirements/recommendations.
- Determine API (Application Programming Interface) with MBDA/PTASSIST/PHOENIX/PTAC/NABEC/CFDA (Catalog of Federal Domestic Assistance).
- Determine E-commerce requirements/recommendations.
- Determine security and SSL certificate level requirements/recommendations.

- **Websites Capabilities:**

- Websites-Revise both websites with current web standards and professional design, interactive elements, daily theme change of elements, graphics and color.
- Websites-Theme to be Professional Business with minimal Native American Indian design elements. Aesthetically engaging layout and logically positioned elements.

- Websites-Easy navigation to all elements and services.
- Websites-Mobile ready version of both sites.
- Websites-NCAIED website development incorporating NativeEDGE and CRM.
- Websites-NativeEDGE website development incorporating CRM as the backend database.
- Websites-Determine best recommendation to tie the sites together seamlessly.
- Websites-Incorporate new programming standards and capability throughout both sites.
- Websites-Showcase site for the RES event with interactive elements, calendar, schedule, polls, poll results, blogs (filtered), countdown, slideshow with comments (filtered), video, booking, tradeshow booking, availability of Tradeshow space, speaker time slots, session time slots, discussions/comments (filtered), etc.
- Websites-Website search for Membership sites.
- Websites-Document control methods for all uploaded documents.
- Websites-Photo, Video, Flash gallery capability. Methods and capability to designate placement of content.
- Other Website functions to be added.
- Websites-Administration control panel
- Websites-Web forms for Feedback, Contact Us. Forms are to be secure and required fields enabled with Captcha technology and field data formatting.
- Websites-Featured daily Member on both sites (specific or random).
- Websites-Featured daily Member Product on both sites (specific or random).
- Websites-Featured daily Member Service on both sites (specific or random).
- Other Featured elements to be added.
- Featured function Administration control panel.

- **Website Ads Capabilities:**

- Websites-Ad banner generation for all Members on each website
- Websites-Ad banner generation of all RC members
- Websites-Ad banner tracking for admin use
- Websites-Ad banner from 3rd party for revenue generation-Secure sandbox area for all 3rd party ad feeds.
- Other Ad banner functions to be added.
- Websites-Ad banner-Administration control panel

- **Tracking Capabilities:**

- Tracking dashboard Control Panel application to reside on user desktop. Functions to include selecting which item to track from a list of available tracking items. Application will rest in Task bar when not in use and will notify user when new data becomes available. Newest data window will be highlighted when expanded from the task bar. Output of data to be generated in a ticker type or other graphical view of progress, information to be updated in real-time as updates become available. Exporting and printing of GUI to be used in presentations.
- Tracking Member relationship-N2N (Native to Native).
- Tracking Member relationship with other members and RC.
- Tracking Member online sales and interactions.
- Tracking Member and program staff interactions and progress.
- Tracking Program client interactions on tools in use for Managers and consultants.
- Tracking Manager progress of projects for Executive Managers.
- Tracking Consultant progress of projects for Management.
- Other Tracking methods to be added.
- Tracking-Administration control panel

- **Membership tools Capabilities:**

- Membership tools for Business Development Business plans with a step by step process.
- Membership tools for Business Loan application for bank with a step by step process.
- Membership tools for Business NCAIED Loan application for NCAIED members with a step by step process.

- Membership tools for Business Start-up development with a step by step process.
 - Membership tools for Business Legal processes with a step by step process.
 - Membership tools for Business Budget processes with a step by step process.
 - Membership tools for Business Expense report processes with a step by step process.
 - Membership tools for Business Marketing processes with a step by step process.
 - Membership tools for Business Education documents for Members, topics in business development, SOHO setup, marketing, customer relations, customer services, etc.
 - Membership tools-Export and Print capability. Ability to complete process anytime after logging back in.
 - Other Tools to be added.
 - Membership tools-Administration control panel
- **NCAIED Programs Capabilities:**
 - Program client intake form data goes into CRM and tied into API with granting agency web portal.
 - Program Client relations tracking with Members, Resource Council, NCAIED Programs and Consultants.
 - Program Client Statics dashboard application for staff use.
 - Program Client referral to other agencies if the client is not in a supported region.
 - Program Client option to join fee based Membership.
 - Program Client manager control panel for each manager.
 - Other Client functions to be added.
 - Program-Administration control panel
- **Processes/Methods Capabilities:**
 - Process-Automated email notifications to update user data for all users of the CRM database. Up-to-date or Edit buttons.
 - Process-Record interactions. List to be generated every 2 weeks of all activity. Highlight inactive accounts for verification. Information on the Admin control panel.
 - Process-User data updating capability for all users after logging in.
 - Process-forms drop down selection list with tips from key entry function.
 - Process-forms multiple selection-using control (ctrl) key where applicable.
 - Process-clickable member link to expand info.
 - Process-Login attributes, user name, password, secret word, lost user name, lost password. First time setup, use Captcha.
 - Process-Captcha for first time setup, information edit saves.
 - Process-Use SSL certificate for all CRM database activity.
 - Other Process functions to be added.
- **Ecommerce Capabilities:**
 - E-commerce-Website e-commerce capability.
 - E-commerce for NCAIED payments.
 - E-commerce for Membership payment/shopping cart.
 - E-commerce for Membership website online payment with options.
 - E-commerce-Membership member online shopping control panel for products and services tied into ecommerce.
 - Other E-commerce functions to be added.
 - E-commerce-Administration control panel
- **Membership Capabilities:**
 - Membership-Bid matching capability.
 - Membership-Opportunity posting capability.
 - Membership data processing capability.
 - Membership intake form and formatting of data for the CRM database.
 - Membership websites generated from user input, data to be stored in CRM for use.
 - Membership websites access by searching from pull down menu or keyword search with options.

- Membership Online shopping capability on member websites for products and services.
 - Other Membership functions to be added.
 - Membership-Administration control panel.
- **CRM/CMS Capabilities:**
 - CRM/CMS establishment for Staff, Consultants, Program Managers, Members, Executive management, Resource Council, Website users.
 - CRM/CMS restrictive access levels for all users.
 - CRM/CMS data, document tracking capabilities.
 - CRM/CMS database Hosting of both sites.
 - CRM/CMS database importing/exporting data into several formats capability.
 - CRM/CMS-Data conformity filter before data goes into CRM database.
 - CRM/CMS-Resource Council website CRM database searching capability - Limited to Membership data.
 - CRM/CMS-Resource council access to CRM data with limitations.
 - CRM/CMS-NCAIED staff access to membership information after logging in.
 - CRM/CMS-Reporting, report generation methods and functions.
 - CRM/CMS-Aggregate, conform and filter all NCAIED database data in use and import into the new CRM database.
 - Other CRM/CMS functions to be added.
 - CRM/CMS database and administration control panel.
- **Dynamic Data Capabilities:**
 - Dynamic Data generation into metrics for Executive management.
 - Dynamic Data generation into metrics for Program Management.
 - Dynamic Data generation into metrics for Program Consultants.
 - Dynamic Data generation into metrics for Resource Council.
 - Dynamic Data generation into metrics for Members.
 - Dynamic Data generation into metrics for websites.
 - Dynamic Data-Types of data to be aggregated and generated: Number of Programs, clients, dollar amounts, jobs created, businesses started, businesses helped, business development, number of members served, break down of each into specific categories.
 - Other Dynamic Data functions to be added.
 - Dynamic Data administration control panel.
- **RSS Capabilities:**
 - RSS feeds from all Native American Indian business news feeds.
 - RSS feeds from Facebook and Twitter.
 - Other RSS functions to be added.
 - RSS feeds-Administration control panel.
- **Calendar Capabilities:**
 - Calendar for National Native American Indian business events
 - Calendar for NCAIED events.
 - Other Calendar functions to be added.
 - Calendar-Administration control panel
- **Administration Capabilities:**
 - Admin-Drop down list editing through admin access.
 - Other Administration capabilities to be added.
 - Admin-Administrator central control panel of all control panels.

PROPOSAL CONTENT

All proposals are to include the following:

- Contact information for the respondent.
- Location of respondent corporate offices.
- Number of years of experience respondent has in installing and supporting similar systems.
- Description of the proposed process for Information Technology Services.
- Accessibility features of the proposed website.
- Description of infrastructure, utilities and tools proposed for web page creation and maintenance.
- Proposed phases or steps in implementation of the website design, infrastructure and hosting.
- Options for training NCAIED staff in creating and maintaining website content.
- Description of ongoing support provisions.
- Separation of one time and recurring costs for: Website design; Infrastructure; Training; Hosting.
- Specifications and configurations required to support the proposed system, including specifications for all software components required for the system, but not provided as part of the proposal. In other words, hardware and software requirements for NCAIED workstations and network configuration.
- Requirements, if any, for NCAIED bandwidth to the Internet necessary to support reasonable performance of website maintenance tools.
- Information on hosting site including specifications on security, disaster recovery, and procedures for handling outages.
- List of current customers using the proposed service/system that NCAIED can contact.
- Listing of fees
- An estimated fee schedule with timeline for completion
- **A final NOT TO EXCEED FEE must be included**

CONDITIONS OF WORK

- Final agreement(s) must be reviewed and approved by NCAIED Executive management.
- Vendor will be responsible for all licenses, permits, fees and taxes associated with the system installation.
- All hardware, network, and software installation and configuration must be performed in cooperation with NCAIED Technical Services.
- The implementation must be accomplished in a manner that minimizes disruption of NCAIED business via the Internet.

EVALUATION OF PROPOSALS

Price will be a significant, but not the only, criteria in evaluating the proposals.

Consideration will also be given to the following:

- The extent to which the proposed system provides the Features & Capabilities outlined above.
- Responses to requests for additional information submitted to the respondents.
- Degree to which the proposed system fits the existing information technology infrastructure at NCAIED.
- The award will be made to the qualified respondent whose proposal is most advantageous to NCAIED with price and other factors considered.
- NCAIED may reject any and all proposals.

NCAIED CONTACT

Questions about the project may be directed to:

Aarrin Yazzi, I.T. Manager

NCAIED

(480) 545-1298

ncaied@ncaied.org

All proposals must be received by 4:00 PM on the date indicated on the front page. Proposals may be submitted electronically in PDF format. Late arrivals with postmarks after the deadline will not be accepted. All expenses for preparation of the proposal package are the responsibility of the respondent. All materials submitted in response to this RFP will become the property of NCAIED.

Completed proposals must be submitted by mail or delivery to:

NCAIED

953 E. Juanita Ave.

Mesa, Arizona 85204

Or by email to:

ncaied@ncaied.org