

**REQUEST FOR PROPOSALS**

**USCHESS.ORG**

**REDESIGN AND DEPLOYMENT PROJECT**

**PHASE 2**

**UNITED STATES CHESS FEDERATION**

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## **Organizational background**

The United States Chess Federation (US Chess) is the official, not-for-profit 501 (c)(3) US membership organization for chess players and chess supporters of all ages and strengths, from beginners to Grandmasters.

Our mission is empowering people through chess one move at a time. Our vision is to enrich the lives of all persons and communities through increasing the play, study, and appreciation of the game of chess.

Founded in 1939, US Chess has grown to serve over 80,000 members and 2,000 affiliated chess clubs and organizations today. In 2014, the organization transitioned from a 501(c)4 to a 501(c)3 charitable organization.

Under the management of a professional staff headquartered in Crossville, Tennessee, US Chess sanctions thousands of tournaments with over half a million officially rated games annually. 25 National Championships award titles to both amateurs and professionals, ranging from elementary school students to senior citizens. Over fifty Grandmasters represent the US internationally.

## **Project background**

US Chess conducted a top-to-bottom review of its web presence. The review was conducted by a 10-member committee between March and November, 2013. A copy of this report is available upon request.

The project was originally designed and approved to be completed in multiple phases. In 2015, US Chess began work on the first Phase of this project. Since then, the following primary changes have been completed: a move to Amazon Web Services for hosting, a move to WordPress for content management, a move to Stripe as the credit card payment processor for donations (this is different from the payment processor still used in the US Chess webstore), a reorganized front page and sitemap to reflect the organization's new status as a 501(c)(3) organization, introduction of a new module where games can be replayed on the page, redesigned news section, and redesigned front page for the Member Services Area (MSA).

## **Original Project Summary and Goals**

Although the project was originally designed and approved to be completed in multiple phases, US Chess is now seeking proposals from vendors to complete all remaining phases as a single project with a more aggressive timeline.

1. Prominently publicize promote US Chess as a 501(c)(3) organization and inspire visitors to donate to US Chess
2. Display website content well in mobile environments
3. Modernize US Chess website with an updated look and tone for the site

4. Develop CMS that allows US Chess staff to easily update and change content
5. Improve user experience by addressing Audience Segments and Needs

Content production, design work, and technical decisions should meet the needs of the numerous distinct groups of user-stakeholders that US Chess has, each with unique needs. Below are the some of the distinct groups or *audience segments*) and their user needs.

Current/ former US Chess members, coaches, and parents

- Easily access the existing member sections of the site so they can log in, find clubs, find upcoming tournaments, check ratings, find tournament results, get forms, etc.
- Find news via US Chess News blog
- Easily access the existing member pages so they can find their ID, renew membership, read magazine online

Parents of scholastic members

- Learn about US Chess programs, US Chess membership, and benefits of chess
- Easily access the existing site sections that to renew their child's membership, look up their child's rating, find upcoming tournaments, find local clubs, look up tournaments results

Tournament director/organizer/affiliate

- Easily access the existing member sections of the site so they can log in, find clubs, tournaments, ratings, get forms, etc., submit rating reports online, submit Tournament Life Announcements (TLAs) online

Prospective Members

- Find out about the benefits of membership
- Find out about the costs of joining
- Learn about local clubs and tournaments

Donor/Prospective Donor

- Be inspired to donate by seeing how Chess changes lives
- Learn more about US Chess and its programs
- Better understand the benefits of chess and of supporting US Chess
- Get information about the organization's governance and financials
- Easily access the existing site sections that pertain to upcoming national scholastic events, scholarships, chess coaches, ratings, and membership info

Advertisers/Sponsors

- Understand the benefits of advertising on uschess.org, including membership demographics, web traffic, and other metrics
- Quickly find available advertising package options and easy contact info

Casual Chess Players (maybe not familiar with US Chess)

- Learn more about US Chess and its programs
- Better understand the benefits of chess
- Learn about playing chess; chess rules and ratings
- Find tournaments and chess clubs

## Press/Media

- Learn more about US Chess and its programs
- Easily access press releases and contact info

## **Project requirements**

This RFP covers the milestones and goals that the successful proposal will benchmark and address.

### **Review of existing design**

The new site's design has largely been well received. However, there are concerns about the rotator image being too large even for most standard laptops or desktop monitors, as it takes up all the "above the fold" space. This has also caused some issues for users on mobile devices. There have also been concerns about the lack of integration and re-design of new pages particularly for some of the site's crucial areas including: Chess Life magazine, remaining MSA pages, and National Tournaments information/registration pages.

### **User-level security**

There will need to be numerous levels of security/access, because some areas of the site will need to be editable by various users. However, the user-level security will need to be overseen by US Chess staff, under the leadership of the Executive Director. Role-based security and the ability to combine multiple roles under a single user will need to be considered.

### **Database compatibility**

The site will eventually have to interface with several different databases (likely all SQL), with the distinct possibility of additional databases being developed as needed. The need for user-level security considerations, among others, may require the entire database to be redesigned. The successful proposal will address the bidder's capacity and experience with database design.

### **Mobile friendliness**

All parts of the new USChess.org need to at least display in proportion and function on mobile devices, particularly smartphones and tablets. For some of the more complex pages, mobile devices may only show a subset of the information on the page or present it in multiple pages.

### **Migration of current functionality to new site and testing of same**

The US Chess Federation currently uses servers in three separate environments. The in-house database server is a VMWare 6 virtual server running Centos 7. The database software is PostgreSQL 9.3.6. Other virtual servers handle email (Exchange Mail) and Active Directory service. Pages that use WordPress (notably the home page) run at WP-Engine.

Other website pages that do not use WordPress run on Amazon AWS servers, accessing a separate Amazon MySQL server. For historical reasons, the web store and other pages requiring secure access run on a separate server from less secure applications, like our Member Services Area.

The US Chess website currently runs on two servers. The main website, at [www.uschess.org](http://www.uschess.org), currently uses AWS for hosting, and WordPress for CMS. However, portions of that site, notably the Member Services Area, use a separate MySQL database that has over 900,000 current and former member records and detailed history of nearly 200,000 US Chess-rated events dating back to late 1991. There is also an active member Forum, currently using phpBB3.

The current CMS includes an active US Chess News section and member access to archives of our print magazines. Content on [www.uschess.org](http://www.uschess.org) requires three access categories: Public access, access limited to registered users, and access limited to current US Chess members. Some access may also be restricted by age.

For security reasons, several tasks, including all website-initiated credit card transactions excluding donations, currently run on a separate secure server, [secure2.uschess.org](http://secure2.uschess.org). This site runs our custom-programmed membership and tournament registration webstore and a separate secure area for Tournament Organizers and Tournament Directors to announce, upload, edit and submit US Chess-rated chess tournaments and related transactions (including memberships) This site also handles opt-in and opt-out transactions related to CAN-SPAM act compliance for our bulk mailing system (which is maintained on our internal server and is not part of this RFP), voter registration transactions, group membership transactions using a voucher system and access to US Chess governance information available to US Chess members.

## **Archiving of current site**

At the conclusion of the project, information on our current site (and some previously archived material currently available at [archive.uschess.org](http://archive.uschess.org)), should be archived under the new site, with content clearly identified as archival and thus potentially outdated.

## **Project objectives**

The long-term objectives of this project are:

1. Full migration of all existing features into our WordPress CMS
2. Conduct load performance testing for redesigned pages
3. Redesign/creation of a database using existing SQL data that has all of the features of the current MSA
4. Admin panel that allows for creation of unlimited user logins with various levels of access to various parts of the site, and allows users to manage certain parts of their environment while logged in to the site

5. Add custom search experience
6. Migrate content for all existing static web pages
7. Rebuild the Member Services Area (MSA) application with player ratings database
8. Rebuild event calendars
9. Redesign and rebuild the Tournament Life Announcements (TLA) application
10. Rebuild the Membership Webstore ("Webstore") application
11. Rebuild the Tournament Director / Affiliate Area (TD/A) application
12. Rebuild member database, including profiles and social integration
13. Redesign and relaunch the member forums, with historic forum content migration
14. Design and implement an integrated donor database
15. Modernize email newsletter management system
16. Integrate intuitive archiving and indexing of the online viewer/digital version of Chess Life magazine into design (rebuild of online viewer is not required)

## **Project milestones**

The estimated timeline for this project is 12-15 months with completion taking place in August 2018.

- Determination of winning bid
- Completion of technical requirements document
- Completion of design document
- Completion of development, unit and functional testing
- Site released to US Chess for testing
- Site goes live

## Questions and Proposal Requirements

### Vendor Qualifications

US Chess will evaluate vendor experience, qualifications and capabilities for developing and implementing a new website. The desired qualifications are outlined below.

Responders are required to submit a written narrative corresponding to each of the underlined section items:

#### Introduction

- Overview and summary of how your company will assist US Chess in reaching our website goals

#### Company Profile

- Company overview and history
  - o How long has the company been in business
  - o Number of current employees
  - o Number of clients
- Capabilities of company - Why should your company be chosen

#### Management Team

- Name, title, role (e.g., project management, training, design)
- Education, years of experience

#### Project Development Approach

- Average timeline
- Detailed explanation of all project phases including consultation, design, development, training, implementation
- Training options
- What role US Chess staff and the US Chess Website Advisory Committee will play in the project

#### Scope of Work

- Project phase deliverables
- What will be expected of US Chess
- What US Chess can expect from the company

In your proposal, please be sure to include a list of references, work portfolio, and estimated budget for this project.

Successful proposals will address the following questions:

What experience do you have with creating websites for non-profit organizations?

What experience do you have creating websites for clients who have a committee process for review?

What experience do you have designing, optimizing or migrating large data sets?



What experience do you have creating administrative controls for website access, including defining user roles?

What experience do you have creating custom plugins or functionality at the CMS level?

What experience do you and/or members of your team have with using the US Chess website as a member, tournament, director, affiliate, or organizer?

What is your approach on ensuring on optimal performance during heavy load on a public web site during high usage traffic? Explain compilation of realistic data to simulate increased load and volume.

## **Contact information and deadline for submissions.**

The approximate RFP schedule is summarized below:

- Issuance of RFP: March 21, 2017 -Website Design and Development Request for Proposals
- Vendor questions: April 4, 2017-Requests for clarification from US Chess due
- Response to Vendor Questions Published- April 14, 2017
- Vendor Proposals due- May 1, 2017
- Vendor selection- interviews, selection of finalists, approval, enter negotiations, execute a professional services agreement: May-June 2017

\* Dates subject to change

Submissions may be remitted electronically:

[jmisner@uschess.org](mailto:jmisner@uschess.org)

## **Notice and Disclaimer**

US Chess retains the rights to:

- accept non-compliant or "late" responses;
- discontinue the RFP process and not award a contract;
- change the RFP process as outlined in the RFP document, including any relevant timetables and how proposals may be assessed.