



CENTER FOR ECONOMIC PROGRESS

REQUEST FOR PROPOSALS

NATIONAL COMMUNITY TAX COALITION WEBSITE REDESIGN

November 10, 2008

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1. SUMMARY

The Center for Progress (CEP), the leader of the National Community Tax Coalition (NCTC), is accepting proposals to redesign the NCTC website. Phase 1, the subject of this RFP, will result in the creation of a Site Requirements brief. Following completion of the Site Requirements, NCTC will issue a separate RFP for Phase 2 to select a vendor to create the new website in 2009 when have the necessary funding available.

The purpose of this RFP is to provide a fair evaluation for all candidates and to provide candidates with the evaluation criteria against which they will be judged.

The existing NCTC website at www.tax-coalition.org was created in 2004 and redesigned in 2006. The site is maintained with in-house resources.

2. PROPOSAL GUIDELINES AND REQUIREMENTS

This is an open and competitive process.

Proposals received after 12 noon Central Time, Friday, November 28, 2008 will not be considered and will be returned unopened.

The proposal must contain the signature of a duly authorized officer or agent of the company submitting the proposal.

If you wish to submit alternate solutions, please do so.

The price you quote should be inclusive. If your price excludes certain fees or charges, you must provide a detailed list of excluded fees with a complete explanation of the nature of those fees.

If the execution of the work to be performed by your company requires the hiring of sub-contractors, you must clearly state this in your proposal. Sub-contractors must be identified and the work they perform must be defined. In your proposal, please provide the name, address and EIN of the sub-contractor. CEP will not refuse a proposal based upon the use of sub-contractors; however, we retain the right to refuse the sub-contractors you have chosen.

Provisions of this RFP and the contents of the successful responses are considered available for inclusion in final contractual obligations.

3. CONTRACT TERMS

CEP will negotiate contract terms upon selection. A project will be awarded upon signing of an agreement or contract which outlines terms, scope, budget, timeline and other necessary items.

The Center for Economic Progress is the legal entity; NCTC is one of its projects.

Being selected for Phase 1 does not imply that the vendor will be selected for Phase 2, the building of the site.

4. PURPOSE, DESCRIPTION AND OBJECTIVES

Purpose

Based on the growth of NCTC and the expansion of the community VITA field, NCTC is seeking a refreshed website. In addition, NCTC currently has a web presence that is not integrated with many other online tools we use for managing our members, events, and communications (see Appendix A). As CEP is moving to agency-wide use of Salesforce.com for Constituent Relationship Management (CRM), we have an opportunity to lay the foundation for integration between NCTC's website, NCTC member data in Salesforce.com, and our "best of breed" online tools.

Description

Create an interactive, informative website that is easy to maintain. We want a user friendly site that can deliver large amounts of constantly changing information to our key audiences. In addition, we need a Content Management System (CMS) that allows staff and other users to easily update content without directly accessing source code, and which automates workflows based on roles such as author, editor, and publisher.

To be effective, our website must be:

- Easy and intuitive
- Visually attractive
- Informative
- Interactive
- Safe and secure
- Data driven
- Quick to load and operate

Our Vision

We seek to develop an interactive, web-based portal featuring a suite of services to aid the work of community organizations seeking to improve the economic well-being of low and moderate income workers with a special focus on the tax code. We will provide a user friendly on-line hub that stimulates the sharing of information and best practices, promotes networking and encourages action. The goal is to dramatically increase the impact of free tax preparation and asset-building organizations while strengthening their capacity and infrastructure.

The website will place a multitude of easily accessed resources at the fingertips of practitioners and advocates of working families 24/7. Meanwhile, it would greatly impact the day to day work of NCTC, by allowing affiliates and associates to manage their own data, streamlining data collection and analysis, channeling advocacy efforts, improving the effectiveness of technical assistance, and reducing staff time spent on overlapping tasks.

Aims

Our primary internet aims are to:

- Increase the visibility and credibility of NCTC

- Improve the ability of our affiliates to provide their tax preparation and financial services
- Sustain NCTC and its programs through paid affiliations
- Mobilize affiliates for advocacy

Business Objectives

Implementing this project will result in:

- Easier sharing of information between affiliates: users will be able to search data on our site to obtain information such as a membership directory to locate other affiliates in their region, or use a program locator to search for the nearest tax site, or download documents
- the NCTC website being used frequently by affiliates
- NCTC website mobilizing grassroots activists to influence policy makers
- Providing tools to make action easy for affiliates (advocacy actions, manage their own contact information and services, eCommerce)
- Demonstrating the impact of NCTC by gathering data, data analysis, and presenting data in formats that are easily understood by our audiences
- Non-technical staff being able to create and edit content through a Content Management System (CMS)
- Reduce staff time now spent manually moving and synchronizing data through integration of some website data functions with the agency-wide Salesforce.com Constituent Relationship Management (CRM)

Make it Easy

Redesign the site to deliver intuitive navigation, an improved graphic user interface, and easy-to-find content organization, especially for our Resource Library.

Make it Compelling

Develop tools to deliver timely, relevant answers to the breadth and depth of our affiliates' questions.

Make it Happen

Reinforce NCTC's leadership of the field of free tax preparation and tax credits for working families, and give affiliates an incentive to take action.

5. TIMELINE

This RFP is dated November 10, 2008. Interested vendors may also request a copy be sent via email by contacting Don Wedd at dwedd@economicprogress.org

Event	Date
RFP distribution to vendors	November 10
Proposal due date	November 28
Target date for review of proposals	December 5
Possible interviews with vendors	December 7
Anticipated selection of vendor	December 14

Anticipated notification to unsuccessful vendors	December 30
Anticipated commencement of work	January 4, 2009

Proposals are due no later than 12 noon, Friday, November 28 2008.

Proposals will be evaluated immediately thereafter. During this time, we may require interviews (face-to-face or audio-conference) with our evaluation team. You will be notified if this is requested.

6. BUDGET

The budget must encompass all design components necessary to create the site requirements document.

7. BACKGROUND OF ORGANIZATION

The Center for Economic Progress (CEP) works to increase economic opportunities for low-income families, children, and individuals by improving access to public, private, and non-profit programs and services. Through advocacy, direct service, outreach, and training, the Center challenges barriers facing its constituency, thus encouraging self-sufficiency and promoting economic prosperity.

The Center is national leader in providing high-quality, demand-driven free tax preparation assistance and using the tax code to promote greater asset-building opportunities among working families and individuals. Along with operating one of the country's largest and most successful free tax preparation programs, the Center convenes the National Community Tax Coalition, which represents to over 600 affiliate organizations covering all 50 states, promoting best practices among programs and pushing for more progressive tax and asset policies on the local, state, and federal level.

Programs and Services Overview

NCTC's work has two major components, capacity building and training, and advocacy.

Capacity building and training activities include:

- Online web seminars and audio-conferences
- National conferences and regional summits
- Technical assistance delivered by site visits, email, phone and web resources
- Toolkits, publications and other resources
- Listservs for peer sharing
- Electronic newsletter

Advocacy activities include:

- Action alerts
- Mobilization of affiliates for lobbying at state and federal levels

- Online web seminars and audio-conferences
- Policy analyses backed by data
- Conference calls and webinars
- Administrative advocacy with federal agencies, especially the Internal Revenue Service

Geographics

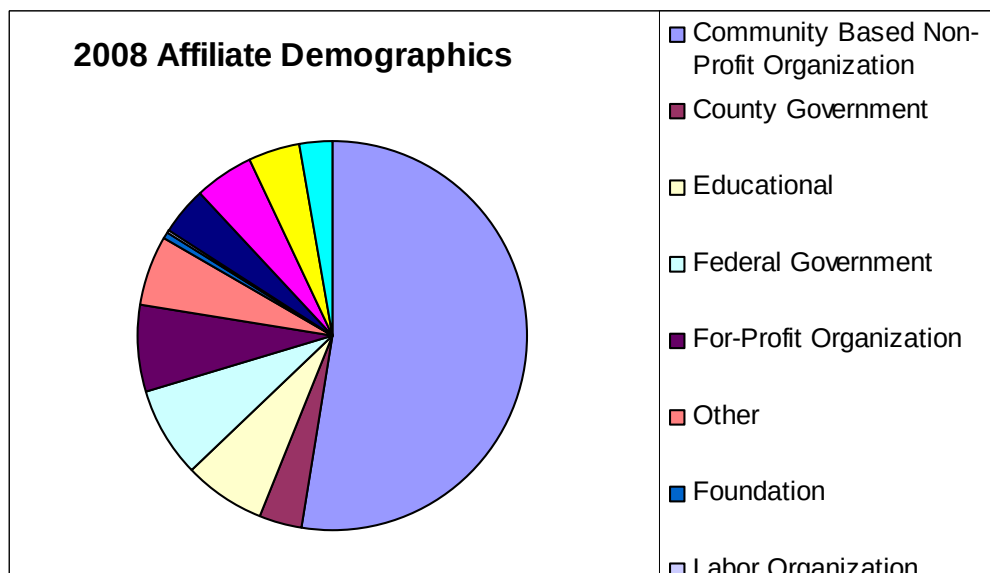
Our geographic market is the United States. Affiliates come from all 50 states.

Member Demographics

Our members are involved in the field of free tax preparation and tax credits for low-income taxpayers and consist of:

- Paid affiliates and unpaid associates (both of these are mostly nonprofit organizations, plus a few individuals working in the field)
- Government agencies (municipal, state and federal)
- Foundations
- Academics
- For Profit businesses involved in the field as funders or consultants

We have over 700 affiliated organizations.



8. AUDIENCE

Stakeholders and audience groups:

Primary:

- Nonprofit organizations in community tax preparation and asset building
- Funders (government, foundations, financial institutions)

- Individuals working in our field
- Grassroots activists
- CEP staff

Secondary:

- Prospective funders
- Prospective community partners

9. SCOPE AND GUIDELINES

In Scope

- User interviews
- Evaluation of present site
- Functional requirements
- Persona development
- User definition
- Content requirements
- Navigation and hierarchy
- Technical requirements
- Interface design
- Prioritization of functions into core and optional

Out of Scope

- Brand development
- Graphic design and visual language
- Copywriting
- Site building

Note: Branding, graphic design and visual language will be developed by a consultant separately hired by CEP; the vendor will be expected to work collaboratively with this designer on the interface design

Discovery & Analysis

Confirm goals, audiences, website objectives, required and optional functionality, site marketing, technology issues and assumptions, phasing, and budgetary constraints.

Design

Functional requirements, persona development, website information architecture, site architecture, user navigation, home page and navigation wireframes for each of the main navigation links, technical requirements, and interface design

Site Definition

Final Site Requirements brief covering:

- Navigation structure
- Wireframes
- Site map
- Prioritized functionality
- Site sections with primary users, content and outcomes

- Technical requirements
- Editorial directions for writing copy
- Means and degrees of integrations with Salesforce.com and our other online tools

Development Guidelines

The website designed by the successful candidate must meet the following criteria:

- Visually Appealing—The site must have an attractive mix of text and graphics
- Common Theme—each section of the site should have a common look and feel. The NCTC logo (possibly as part of a banner) should be prominently displayed on each page
- Easy to Navigate—Information should be grouped and presented in a logical manner and required no more than 4 levels for the user to "drill down" to find the desired information.
- Development of web pages to accommodate the proposed navigation scheme.
- Management of up to 3,000 documents in form that is easy for staff to manage and users to retrieve, and includes automated archiving of documents based on a pre-set archive date
- Print-friendly pages
- Each page should include a list of related content, dynamically generated based on taxonomy or keywords
- All documents should have metadata that is searchable by category, tag, date, author, topic, content
- Other functionality as chosen during the discovery phase (see Appendix for C work already done by staff)
- Integration with Salesforce.com for member data, simple event registration, and other functionality identified in the discovery process and within budget
- Easy newsletter subscription and unsubscription, integrated with bulk email tool and Salesforce.com
-

Project Management—An assigned project manager will be made available to present information and coordinate with NCTC staff, including a reasonable number of meetings (at least one face-to-face) to present design and development solutions

While not in scope for Phase 1, the following guidelines for the implementation of the design should be kept in mind:

- Utilizes a CMS that will permit non-technical staff to instantly update website content on specific pages. An open source CMS is required, with Plone and Drupal preferred for their ability to integrate with Salesforce.com. We will accept proposals relying on other CMSes if they also meet the stated requirements of this document
- Much of the content of the site will be re-written during Phase 2, with the possible exception of the Resource Library. In addition, new content will be identified during the discovery process.

Site Specifications

The Site Requirements brief should specify the following or similar technical requirements:

- Microsoft Internet Explorer 6.0 or higher for Windows, Firefox 1.05 or higher, Mozilla 1.7 or higher, Safari 1.2 (or higher) for Macintosh
- Site must validate for CSS and XHTML
- Meets ADA requirements—The site should be developed to meet all federally-mandated access requirements adopted by the Federal Access Board under section 508 subsection 1194.22 of the Rehabilitation Act.
- Site must be built in accordance to the Web Content Accessibility Guidelines provided by the W3C and should also be easily accessible to the novice as well as the fully experienced internet user
- Fast loading pages—The website must be designed with a balance of text and graphics such that each page loads in 8 seconds or less on a computer using a 56kb modem
- Design should be fluid to accommodate various screen resolutions

10. AVAILABLE TECHNOLOGY RESOURCES/INTEGRATION ISSUES

- Integration with CEP's Salesforce.com CRM is required.
- Integration with our other online tools currently in use, or which rank high on the list of functionality confirmed during the discovery process, where within budget.

11. STAFF RESOURCES

A successful planning effort is driven by an interdisciplinary team of participants. The core team will be driven by two roles:

Executive Sponsor, responsible for sign-off on key decisions, providing project steering and maintaining relationships with outside stakeholders—Jackie Lynn Coleman

Project Manager, responsible for keeping the project on schedule and within the budget. Maintains communication between other team members—Don Wedd

Other team members and content stakeholders will include:

- NCTC Steering Committee
- NCTC staff
- Advocacy Dept. staff
- Capacity Building & Training Dept. staff
- CEP senior management
- Graphic design consultant contracted by CEP

12. QUALIFICATIONS

- List the five Web sites your firm has designed that best reflect your work and relevancy to this project. Briefly list the role your firm played in each project. The URL should be submitted. Only sites that are live will qualify during evaluation.

- Describe your experience in designing sites for non-profit and/or community-focused projects.
- Provide current reference information for your three most recent clients.
- How many full-time staff does your firm employ? Please include a copy of your firm's organizational chart.
- Provide a company profile, length of time in business and core competencies.
- Briefly describe the percentage of your Web staff that would end up working on this project relative to your entire staff (using full time equivalents). For example, if you would use five staff on the project and you have ten Web designers and developers, the percentage would be 50%.
- What type of team will be assigned to this project? What will each person's role be? Please include a brief background summary for each key staff member assigned to this project.
- Briefly describe your firm's project management process.
- Percent of total revenue derived from site design and development and other business ventures.
- Explain your business model.
- Please discuss any planned IPOs, mergers or acquisitions.
- Please discuss any hardware/software vendor partnerships.
- Time frame for completion. The time frame for completion of the project will be evaluated. In addition, time frames will be part of the contractual agreement; therefore, a realistic time frame for completion is requested.
- Process to include input from all program areas. Please state how you intend to communicate with all program areas to gather all of the required information.
- Terms and conditions.

13. EVALUATION CRITERIA

The following criteria will form the basis upon which NCTC will evaluate proposals. The mandatory criteria must be met and include:

A copy (electronic or paper) of your proposal must be received not later than 12 noon Central Time, Friday, November 28, 2008. Your proposal must include a cost proposal

as described above. All costs associated with the delivery of the project should be presented in a flat rate, fee for service format.

Deliver proposals to the attention of:
Don Wedd
Center for Economic Progress
29 E Madison, Suite 900
Chicago, IL 60602
dwedd@economicprogress.org

Proposals that meet the mandatory requirements, as stated above, will be evaluated with the following criteria:

- Suitability of the Proposal—the proposed solution meets the needs and criteria set forth in the RFP
- Expertise in recommending and communicating appropriate technical and aesthetic solutions as evidenced by proposals and references
- Aesthetical Capabilities—Prior work demonstrates artistic, innovative and user-friendly interfaces that engage communities and viewers
- Candidate Experience—Candidate has successfully completed similar projects and has the qualifications necessary to undertake this project
- Value/Pricing Structure and Price Levels—The price is commensurate with the value offered by the vendor. As a nonprofit institution, CEP is able to accept pro bono service and recognize the provider to the full extent allowed by the Internal Revenue Service, including naming the proposer within the website and other collateral as a NCTC or CEP supporter and partner.
- Depth and Breadth of Staff—The candidate firm has appropriate staff to develop the site in the time frame needed
- Proposal Presentation—The information is presented in a clear, logical manner and is well organized

14. FORMAT FOR PROPOSALS

Please use the following as a guideline to format your proposal:

Length and Font Size:

Please use double-spacing with fonts no smaller than 10 point. Maximum proposal length including title page, cover letter, proposal, qualifications and budget should not exceed 35 pages.

Title Page:

National Community Tax Coalition, Web Site Development Proposal, your company name, address, Web site address, telephone number, fax number, e-mail address and primary contact person.

Cover Letter:

Signed by the person or persons authorized to sign on behalf of the company (1-2 pages).

Proposal:

Discuss your proposed solution, including the features, benefits and uniqueness of your solution. You should also touch on your ability to deliver the project in the timeframe noted in Section 5 (3-10 pages).

Qualifications:

Provide the information requested in Section 12.

Budget and Fees:

List budgets as requested above. Identify staff you anticipate working on the project and their hourly rates for work that may be needed.

APPENDICES

APPENDIX A

List of online tools currently in use

Following a "best-of-breed" approach, we are using some of the best database and constituent communication tools available:

- Cvent for national conference registration
- MS Access for membership database (migrate to Salesforce.com)
- Dreamweaver for managing website
- SurveyMonkey for collecting data and opinions
- GetActive/Convio for advocacy (contract cancelled in 2008, but we may utilize Democracy in Action in 2009)
- ePath for online classes
- Readytalk or Yugma for webinars
- PayPal for online dues payment
- GraphicMail for bulk email and newsletters (migrate to Vertical Response in December?)
- SurveyMonkey for webinar and audio-conference registration

Potential Tools to Enable NCTC Goals

This list of possible web and CRM tools that would facilitate our work was developed by NCTC staff in early 2008.

Goal	Need	Tool	Dependant Upon
Program Development	Means to share knowledge about affiliates with other affiliates engaged in similar activities, or located in the same geographic regions	Online member directory	Collecting information about affiliates
		Mapping	Collecting address information of affiliates
	Means to facilitate the sharing of information between affiliates	Listserv	
		Discussion board	Requires minimum of 50 participants and a facilitator
		Blog	Content creators
Affiliate Engagement	To know which affiliates are likely to act in the future based on knowledge of their past actions and involvements		Integration of advocacy and CBT activity records Ladder of engagement
	To know an affiliate's advocacy connection to legislator (strength of relationship, type of activity)	Power mapping recording: relationship strength and type	Gather information from affiliates
	An affiliate's history of federal and state advocacy activity	Webworm to collect actions taken	Affiliate providing this information to us
	To clearly identify who is an affiliate		Definition of affiliate
	Information on affiliate engagement at our fingertips	CRM	Data from different sources being integrate-able
	Tools to make action easy for affiliates	Online email to politician	
		Online Letter to Editor	

Show Impact	Gather data, analyze it, and present it publicly in formats that are easily understood by their audience	Online mapping	Address information is complete
		Graphic and visualization tools	
		Video and audio stories	Collecting stories
Efficient Use of Staff Time	Data systems that are integrated and communicate with one another	CRM with multiple applications and integrators	
	Web-based forms that input data automatically into the database	Integrators	Blocking spam off webworms APIs
	Efficient business processes	CRM that can automate business processes	Map out present business processes, dream of better ones
A Better Experience for Affiliates	A dynamic website integrated with our affiliates' relationship management database	CRM, CMS with integrator	
	Integrate data so that individuals in NCTC can network easier with one another	Affiliate directory	Definition of who is "affiliate"
	Allow affiliates to manage their own contact information and services	CRM, CMS with integrator	
	Recognizes people when they log in	CRM, CMS with integrator	Affiliates remember their login and password
	Provides an easy tool for low-income taxpayers and programs to identify local tax sites	Online directory	Collection of tax site addresses.

Prioritized List of Features for NCTC website

NCTC staff performed some group work prioritizing functionality early in 2008.

HIGH

Member profile self-management (give affiliates the ability to update their own contact information and change settings via the web)

A comprehensive and effective **site search** function

MEDIUM

Resource Library functions (ability to systematically organize and manage Library areas, document submission functionality, searchable documents, archiving, document rating by users, listing of most popular documents, “other people who downloaded this also looked at...”)

Permissioning capabilities (i.e., Steering Committee and Working Group site areas with archived meeting notes and news updates). Can we retain the present requirement that all users register before first entering the Resource Library?

Data-driven features such as member directories, program locators, searchable.

Mapping to show where affiliates are located, EITC uptake in different regions, where we have affiliates/associates, relevant conferences and events going on nationwide, etc.

Visual representation of our data: static graphics, embedded dynamic graphics

A single and centralized login mechanism for website, member record, other applications. Affiliate “accounts” to pay dues, change contact info, manage account, request TA support, etc.

Wikis (for collaboration, documentation of procedures)

Blogs

Dues management (easily send annual renewal notices and receive payments via the website that automatically update the member record). Requires integration with our CRM.

Paid Affiliate status applies to all members of an organization automatically (giving them access to members-only sections of website)

Data Reporting and Needs Assessment tools (the National Program listing, other data analysis tools to help meet the field’s research needs) that integrate with our CRM

Event Registration (for conferences and webinar or audio-conference trainings, other events) that integrates with our CRM and accepts payments

Surveying capabilities (Program survey data stored and related to program, site feedback forms, the ability to conduct shorter surveys on timely issues, polling?)

E-commerce functionality (credit card and order processing for affiliation fees, event registration fees, purchase of manuals, toolkits, t-shirts, coffee mugs, eBooks and physical books)

Web-based advocacy (automated emails to political representatives, legislation tracking, and recording of campaign participation in the member profile). If we choose a tool, it should integrate with our CRM.

RSS for delivery of all or segmented content from the site

Listserv management (automatic subscriptions, an archive of listserv messages, searchable, permission-based). Integrate with our CRM so we know who current listserv members are.

Newsletter and Advocacy Alerts subscriptions. Online sign-up integrated with our CRM (and allow us to screen membership)

Low

Internal web-based forms and reporting (technical assistance log form, reporting and analysis functions for technical assistance)

National Event Calendar for Coalition and affiliate events (a real calendar with a link to add events to the individual's Outlook or Google calendars)

Bulletin boards or forums for practitioners to share information, news, ask questions (with spam protection)

Membership lists for Working Groups, Steering Committee

A **banner** (perhaps a running banner) across the top with major news or updates.

An archive of web material (material automatically archived on pre-set date)

Online classroom registration (connection to ePath)

Legislative intelligence (power mapping of our constituents' relationship with Congress people, intelligence about Congressional activity, such as Knowledgis)

NEW IDEAS (not yet rated)

Photo gallery (slideshow from recent events, as well as stored gallery from past events)

Technical Assistance request **webworm**

National Job Board for NCTC affiliates

Streaming video

Streaming audio

User submitted content

Community rating of articles and documents

APPENDIX D

This list of values provides CEP with guidance in choosing new software and web applications.

Agency Values for Software Selection	
Item	Details
Ease of use	The ease with which people can employ particular software in order to achieve a particular goal; is it user friendly? How do key user groups respond?
Total cost of ownership	A financial estimate designed to help assess direct and indirect costs related to the purchase of any computer software, including ongoing maintenance, support, and setup/configuration; should include staff time and training
Documentation	Paper book or computer readable files (HTML, PDF pages) that describe the compatibility, structure and components, operation of a product, detailing how the software is designed, how to install the software on the target device, and any known weaknesses in the design of the software
Ability to integrate	Can the application talk to other applications already in use? How difficult is it to share data between applications?
Supports business intelligence	Are the prepackaged reports and analytics useful? Is it necessary/possible to create additional reports?
Supported	Ongoing support is available; what level of support is available? Email, phone, web, help files, training, user groups, etc.
Security	Level of security compatible with internal and external needs; usernames, passwords, encryption, data sharing, etc.
Supports core business processes	Software that generate something of value for each department, the organization, its stakeholders and its customers; are existing standards, workflows, best practices reflected in the software?

Meets requirements	Software has the functionality to fulfill the established needs
Cross-department usefulness	Software that produces data and information in a form that is accessible through a familiar or common interface and that all members of each department, the organization, its stakeholders and our customers can understand; how many departments can use the software?
How many current applications will it replace?	Number of currently used applications that will no longer be needed as result of software purchase