

WEBSITE DESIGN AND DEVELOPMENT SERVICES REQUEST FOR PROPOSALS

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1.0 Statement of Purpose

The design, development, and implementation of a website with front end and back-end functionality for a new business in the professional services industry. The website functionality is to be rolled out over the span of one year based upon complexity and roll out of Chartwell Futures services.

2.0 Background Information

Chartwell Futures offers transformative travel programs and in-community courses for groups and individuals, as well as outsourcing and consulting services for corporate retreats and meetings. We have a sister company, Chartwell Compliance, who is a fintech company acquired by MVB bank in 2019. Both Chartwell Compliance and Chartwell Futures are divisions of Chartwell Foresight, whose parent company is MVB Bank. Our mission statement: We provide novel opportunities for discovery and transformation. Our vision statement: To inspire lives and spark universal connectivity. The current website for Chartwell Futures is: www.chartwellfutures.com.

3.0 Right to Issue RFP

Chartwell Futures reserves the right, at its sole discretion, to issue RFP's for similar work, for other disciplines or types of work, and for other project requests as the need may occur. Chartwell Futures also reserves the right to issue projects to other information technology firms under term contracts at its sole discretion, based on the Chartwell Futures evaluation of each Vendor's qualifications, expertise, current workload, capabilities, performance record, location or distance to the work, and other factors as may be pertinent to the particular project.

4.0 Scope of Work

The Vendor will design the functionality, but not necessarily the look, of Chartwell Futures' website. The design will include a new structure and the options for a new account management and online course delivery. A final scope of work will be developed by agreement with Chartwell Futures and the Vendor.

The following acts only as a preliminary scope to generally communicate Chartwell Futures' expectations.

4.1 Website Development

New website development to include front and backend sites using one of the platforms listed in Stage One below, customer interface, in-house backend, shopping cart capability, and integration with possible CRM integration. This is estimated to be a multi-tiered development project requiring Vendor to work closely with Chartwell Futures staff, followed by an option for pay-as-you-go support services. We are looking for a development partner who can work with us to:

- Stage One
 - Using the current design, develop the website to work on inmotion or liquidweb platforms. The website was designed using Squarespace. It needs to be converted over to work on either the inmotion or liquidweb platform.
 - Browser/Device Compatibility
 - Must be easily viewable from a desktop, tablet or mobile device of any manufacturer. The user experience should be similar across all devices, allowing for differences in device layouts or requirements.

- Must be fully functional, both viewing and editing, with the major browsers and operating systems on PC and Mac.
- Must ensure implementation is functional with the current versions and one version back of major browsers and operating systems
- The site will be required to support browser versions that are more than three years old where the older version still accounts for 10% of site Web traffic.
- Vendors will not be required to develop a solution that supports any browser no longer available for download from the manufacturer's website or whose manufacturer has ceased development.
- Vendors will not be required to develop a solution that supports browsers for operating systems not currently supported by the OS' manufacturing company, or whose manufacturer has ceased development
- Functional viewing with all major mobile devices.
 - The website must be easy to use by viewers and content managers with all major mobile devices, including but not limited to: Tablets – iPad, Samsung Tablet, MS Surface o Smart Phones – iPhone, Blackberry, Android, Google Pixel, Windows Mobile phones, and future phone platforms as they may arise.
- **Search Engine Accessibility Search engine optimization (SEO) and site search functionality.**
 - The site should provide for search engine optimization to allow the highest possible ranking of the individual pages within the site from all major search providers, including but not limited to Bing, Google, MSN Search and Yahoo!
 - The site should be accessible by spiders for the purpose of indexing the site.
 - The site should be structured in a manner that spiders can crawl easily.
 - The site should provide meta-title and meta-description tags that can be maintained by Chartwell Futures staff.
 - The site should provide robust and prominent smart search functionality allowing users to type in a word or phrase to find information on the site.
 - The search feature should provide results for a single word, combination of words, or the exact phrase searching using quotation marks.
 - The search feature should auto correct and/or provide results that best match misspelled words or phrases.
 - The search feature should enable search of both HTML pages and documents, such as PDF files.
 - Results will be returned in order of relevance based on the frequency of the search words in the page content or metadata, and results can be browsed by category.
 - Users should be able to browse search results within different content types, such as documents, event calendar and news.
- The development of mobile applications is excluded from this project scope but site compatibility with mobile devices is within the scope. While outside of this project's scope, vendors may provide information on mobile application development for future consideration.
- Provide site governance guidelines and user instructions (documented) to be used within the platform.
- Consolidate and migrate existing content to the new website with the current design.
- Communications – provide for new functionality on one of the platforms listed above that allows for:

- *Publication:* Provide for the storage of and access to Chartwell Futures' publication, with ability to search publication content and pull previous editions.
 - *Calendar:*
 - Develop a flexible calendar program for Chartwell Futures to visually present its programs and events.
 - Desired features include the ability to view the calendar in either day or month format.
 - The ability to add to specific days hyperlinked events that can lead to either a web page or a document (such as a PDF) is required. It is preferable that the calendar maintain the look and feel of the website and retain the standard calendar look.
 - *Contact Sign-Up:* The ability for visitors to sign up to a mailing list for various communications such as e-notifications on events, publication subscription, or sales. This needs to be CAN-SPAM Act compliant.
 - The Vendor must provide email marketing capabilities that are seamless with the website and have the ability to integrate with current email marketing software. The website company must provide one email template that is consistent with website design.
 - *Blog:* Capability to post blogs that are searchable.
 - *Audio and video embedding:* Ability to embed audio and video in website pages.
 - *Forwarding Page Feature:* Ability to forward pages to friends, coworkers, etc. using a simple form that asks for the sender and recipients email addresses and allows the sender to include a short message to the recipient.
 - *Integrated RSS Feeds:*
 - Integration with social networking applications, including, but not limited to, LinkedIn, Facebook, and Twitter, so users can share Chartwell Futures' information with their social media contacts. The ability to integrate with future social media tools should also be provided.
 - RSS Feed Reader: Ability for staff to set up feed readers for important Company information
 - RSS Feeds: Ability for users to sign up to receive RSS feeds Integration of Third-party Sites and Services Third party tools, features and databases should have the same look and feel as Chartwell Futures' website and the links to the third-party websites should be integrated into the site's navigation:
 - Possibility of live streaming a Chartwell Futures event and future video streaming service for company experiences.
- Stage Two
 - Develop a capability for both company (multi-user access) and individual consumer access to account information (both referred to here generally as "customer") via a secure website login.
 - Each individual consumer customer must be presented as a single integrated record in the system.
 - Each company customer record should have the ability to both aggregate data company-wide at the appropriate user-access level, and provide record data for

- individual participants/users within the company with appropriate user-access restrictions.
- Each customer record should have the capacity to indicate the type of program, dates of program participation, individual and total cost of programs, outstanding balances by program and aggregate.
- Each individual consumer customer must have the ability to update profile data.
- Company customers must have the ability to update both the company profile and allow individual participant/users within the company to update their profiles.
- Develop a back-end functionality for internal and company customer management of users with varying levels of account access authorization and management.
 - Company customers must have varying levels of access providing full account data to include all participants.
- Develop a customer dashboard that pulls customer account data.
- Integrate with a CRM or other solution containing customer data.
- Stage Three
 - Develop a shopping cart function.
 - Develop integration with program catalog with real time inventory updates.
 - Enable connection to customer account profiles for historical and current reference to purchases.
- Stage Four
 - Develop online course delivery function- frontend and backend
 - Develop online course program dashboard for users with access to online course content, ability to sign up for other program items, and overall user account management.
 - Tie into the video streaming capability of the site for participant viewing of online courses based upon account access permissions.
 - The account access permissions must tie into the user accounts and purchases/subscriptions.

4.2 Key Website Requirements:

- The website must showcase our programs, engage visitors, and provide a scalable, maintainable solution.
- Must be safe and secure, easy and intuitive, quick to load and operate, responsive to mobile device and desktop, meet compliance standards, including Americans with Disabilities Act Section 508 and World Wide Web Consortium standards, WCAG 2.1, Section 508 & EN 301549.
 - Site should be accessible to those with disabilities. The final design must comply with all requirements of Web Content Accessibility Guidelines, WCAG 2.0 (Minimum Level AA). The site will support W3C standards as much as technology will allow, so long as it does not reduce the active functionality of the site to our supported users.
- Ensure the site is HTML5, and CSS3 compliant.
- Site should have the ability to scale fonts on each page.
- Allows for self-management of content/ administrator level access
- Minimalist approach
 - Small number of custom pay layouts (3-5 templates to be re-used across the site)
 - 3-click maximum to access to content for users.

- Zero duplication of page links or navigation paths
- Heavy focus on access to services
 - Use of iconography and large-touch tiles for mobility
 - Slide-out main menu availability persistently
 - No drop-down mega menus – click-through to tiled sections
- Robust search component, restricted to internal search of web environment
- Individual participation level access
- Business “owner” level access – needs to tie to individual participants

5.0 Technical Response

5.1 Expectations: The Vendor shall furnish all personnel, facilities, equipment, materials, supplies, and services (except as may be expressly set forth in this contract as furnished by Chartwell Futures) and otherwise do all things necessary for, or incident to, the performance of work as described in Section “Scope of Work”.

5.2 Deliverables: The Vendor is expected to provide the deliverables outlined in Section 3.0.

5.3 Contract Terms and Conditions:

- Bidder to provide their statement of work and SLA to include inspection and acceptance criteria by Chartwell Futures of any product or deliverable.
- All content developed and any related intellectual property related to the site development will be owned by Chartwell Futures
- All billing is paid net 30
- Bidder to sign an NDA related to content ahead of any information exchange on website content

6.0 Submission Instructions

All questions and comments related to this solicitation are to be sent via email to the Point of Contact (POC) below and must include the RFP number and title in the subject line along with the Vendor’s name.

| | |
|----------------------------|--|
| Release Date | 6/21/2022 |
| Questions Due Date | 7/11/2022 |
| RFP Response Due Date/Time | 8/5/2022 |
| RFP POC | Allison Adams aadams@chartwellfutures.com |
| Vendor Website POC | Allison Adams aadams@chartwellfutures.com |

6.1 Vendor Response Requirements

6.1.1 Technical Volume

The technical volume should be a maximum of twenty-five (25) pages, excluding cover page, table of contents, and glossary and consist of the following:

- Cover letter. The letter no more than two pages in length, one inch margin, single spaced, no less than 11pt font, excluding graphics and tables which may be a minimum of 9pt font) and including a table providing the following:
 - Full name of the firm
 - Business organization
 - Year established
 - Federal ID number
 - Firm’s legal formation (e.g., corporation, sole proprietor, etc.)
 - State of incorporation
 - Point of contact for the solicitation to include name, title, email, and phone.
 - An affirmative statement regarding the ability to start immediately upon award of the contract.
 - A statement confirming the proposal will remain value for six (6) months from the date of submission.
 - A self-affirmation that all of the information provided is true, accurate, and complete.
 - A signature by an authorized company official with the capability to bind the Vendor.
- A project statement describing the Vendor’s understanding of the goals and objectives.
- A detailed statement regarding the history and capabilities of the company (maximum four (4) pages, one-inch margins, minimum 11pt font). Included in this section is:
 - An organizational chart with primary roles and responsibilities of each team member who will be assigned to the project, including a breakdown of the time dedicated to our project versus other clients.
 - Should the Vendor be required to change proposed personnel following the award, the Vendor shall provide complete resumes for proposed substitutions to Chartwell Futures POC. Any proposed substitutions should have comparable qualifications to those of the persons being replaced. Vendor shall notify Chartwell Futures within 15 calendar days after receipt of all required information of the consent on substitutions. No changed in the pricing may occur as a result of key personnel substitutions.
 - A clearly designated team leader for the project and the responsibilities of other contributing members, and short biographies related to these team members.
 - Staffing/Outsourcing/Subcontracting: Provide details on any subcontractors that will be used in this project and their qualifications.
- Three client references, preferably in a similar service industry.
- Minimum of two examples websites of a similar style and requirement. Please submit URL for these sites and only currently “live” sites should be provided.
- Technical approach to delivery of the requirements in this solicitation.
 - The expectation is that the Vendor will break the project into major milestones for immediate, mid-term, and long-term goals as detailed in the scope of work above with the approach to the first stage detailed thoroughly.
 - Include a GANTT chart in the technical approach with a clear timeline by deliverable and with milestones for each part of the project.
 - Information on project management tools and ongoing reporting that will be provided.
 - User training and support.

6.1.2 Cost Volume (no limit, separate attachment).

Provide a detailed breakdown by deliverable and milestone of this project. Travel and ODCs will not be reimbursed separately and must be included in the total pricing provided. Indirect burdens are not allowed.

- This project is a Firm Fixed Price contract by stage. Provide a separate document from the Technical Volume detailing the FFP cost of each of the four stages and by deliverable.
- Vendors may propose time and materials (T&M) contract pricing, but must detail hours and pricing structure, how it will address cost overruns, responsibilities, and quality control measures for adhering to schedules and budgets. ISO 9001 certified firms will be weighted more heavily in evaluations of T&M proposals.
- Chartwell Futures is not required to accept the lowest cost proposal and selection of the successful vendor will be based upon the proposal deemed to be in the best interest of Chartwell Futures.

6.1.3 Interview/Scoping Session:

Vendors should expect a minimum one-hour interview/scoping session to discuss alignment of vision and fit for the web development project. Vendors will not be reimbursed for such interview/scoping sessions.

7.0 RFP Files

It is the responsibility of the Vendor to obtain copies of the RFP files related to this project. Word, Excel, or other editable formats will not be provided. Please plan accordingly.

8.0 Evaluation Criteria

Chartwell Futures will utilize a Best Value approach. In consideration of best value, proposals will be evaluated using the following criteria (in order of importance):

| | |
|--|-----------|
| Vendor technical approach | Pass/Fail |
| Vendor experience of a similar scope and size | Pass/Fail |
| Experience of proposed project personnel | Pass/Fail |
| Demonstrated ability to meet deadlines and implement the website in a reasonable timeframe | Pass/Fail |
| Cost | |

9.0 Award

Proposals will be reviewed by an internal committee where proposers will be evaluated and ranked. Proposing firms may be asked to participate in an interview to further discuss qualifications and to answer questions from the committee. The contract will be awarded to the responsible, responsive firm whose proposal, conforming to this solicitation, will be most advantageous to Chartwell Futures, technical response, prior experience, and price considered.

Chartwell Futures reserves the right to accept or reject any or all proposals, in part or whole and to waive informalities and minor irregularities in bids received.

10.0 Withdrawal

Proposals may only be withdrawn by written notice prior to the date and time set for the submission of proposals. No proposal may be withdrawn after the deadline for submission.

11.0 Non-Collusion Clause

By signing and submitting this proposal, proposer states that its proposal is genuine and not collusive or sham; such proposer has not colluded, conspired, connived, or agreed, directly or indirectly, with any proposer or person, to put in a sham bid, or that such other person will refrain from proposing and has not in any manner, directly or indirectly, colluded, conspired, connived, or agreed, with any person, to fix the price of affiant or any other proposer, or to fix any overhead, profit or cost element of said proposal price.

12.0 Incurred Expenses

Costs incurred by the vendor for developing proposals and/or travel to any proposal meetings are entirely the responsibility of the Vendor and shall not be chargeable for reimbursement by the Chartwell Futures.