



**Request for Proposals
Food Hub Design, Development & Hosting
November 25, 2008**

1. Summary

Ecotrust is accepting proposals to design, develop and host a web application that will serve as a directory and marketplace for buyers and sellers of regional agricultural products. This will be a concept to completion production.

2. Contract Terms

Ecotrust will negotiate contract terms upon selection. All contracts are subject to review by Ecotrust, and a project will be awarded upon signing of an agreement or contract, which outlines terms, scope and budget.

3. Organizational and Project Background

Ecotrust's mission is to inspire fresh thinking that creates economic, social and environmental well-being. Ecotrust works on conservation and economic development from Alaska to California by investing in the distinctive natural competitive advantages of individuals, businesses and communities. Ecotrust is an entirely new kind of organization, one that integrates public-private purpose and for-profit and non-profit structures. Among Ecotrust's many innovations are co-founding the world's first environmental bank, starting the world's first ecosystem investment fund, creating a range of programs in fisheries, forestry, food, farms and children's health, and developing new scientific and information tools to improve social, economic and environmental decision-making.

The Food Hub project falls under the purview of the Food & Farms program which seeks to foster a regional food system in the Pacific Northwest by improving public understanding of local agriculture and increasing the market share of locally grown food. For the past five+ years Ecotrust and its partners have produced the Guide to Local and Seasonal Products for Oregon and Washington. Originally launched as a print directory of regional food producers and buyers, records from the Guide are now also available on-line at www.farmerchefconnection.org. This site was designed in Plone and offers very basic search functionality as well as a cumbersome user registration process. Food Hub represents an attempt to vastly improve and upgrade the current Farmer Chef Connection website, re-brand the service as Food Hub, and add additional functionality and project partners.

4. Project Description and Rationale

Ecotrust would like to create a web-based wholesale-direct trading platform called Food Hub.

Recently, a new category of buyers has become interested in purchasing locally or regionally grown food. These larger-volume and institutional purchasers such as public schools, hospitals, food service providers on college and corporate campuses, and retail stores are increasingly assigning geographic preference as a key purchase criterion along with long-standing cost, quality, quantity, and delivery requirements.

Though this shift in demand represents a significant business opportunity for farmers and ranchers and good news for eaters, structural barriers include:

- a. Most larger-volume and institutional purchasers source product through wholesale distributors and broadline distributors.
- b. Small producers typically cannot individually meet the minimum order (volume) and uniformity requirements of these wholesale distributors.
- c. It is often infeasible for larger-volume and institutional purchasers to do business outside of their current, streamlined, supply chain model. For instance, most larger-volume buyers do not have the capacity to receive multiple deliveries of product from individual suppliers throughout the week or to manage receipt and payment of multiple invoices from various individual producers. Another complicating factor is that many institutional buyers receive bonuses and rebates through National Volume Discounts (NVDs) which create a disincentive to purchase outside of their standard contracts.
- d. The ability to highlight environmentally responsible production methods is a key marketing strategy for many small and medium-scale food producers who seek to differentiate their products. Yet, sales to traditional wholesale distributors often result in a discontinuity of information flow, negating opportunities for many conscientious growers to receive compensation for the social and environmental attributes that differentiate their products. Their "stories" tend to get lost.

In response to these system constraints, Ecotrust proposes to build Food Hub. This site, when fully developed, will offer three levels of service to its users. Although it is our intention to provide a highly detailed description of the services necessary for a successful site, we recognize that solution sets not identified here may provide a more effective and efficient way to meet our business goals, therefore this document and the scope described herein may be modified once selection of a firm is complete.

Tier I:

Buyers and sellers utilize online tools to input and maintain business profiles which provide details such as contact information, certifications held, products available for purchase, pick up and delivery information. At this service level it is our goal to keep barriers-to-entry low to ensure that a large community of buyers and sellers actively participate. Tier I service does not offer online commerce between buyer and seller; however it does provide a sophisticated forum for researching and connecting potential partners.

Additionally Tier I will provide a resource guide for both buyers and sellers. The content in this section will range from quick tips to in depth explanations of common certifications and guidelines. And as the full functionality of the site will ultimately only be available to subscribers, functionality to capture payment for subscriptions must be implemented.

Tier II:

At the secondary level of service, Food Hub allows for basic one-to-one transactions, helping buyers select sellers who meet their requirements for product, insurance coverage, delivery schedule, food safety and handling criterion, etc. This service level also includes standardized purchase orders and invoices – tools that are not currently in place for many small farmers who seek relationships with larger institutional buyers.

Tier III:

Logistics coordination and a transaction and order fulfillment system is the hallmark of Tier III. Third party trucking and warehouse operators will handle inbound deliveries, cross dock and order staging. Please note: Food Hub is not intended to replace existing distribution models.

This RFP is soliciting proposals from qualified firms to build Food Hub up to the Tier II level of service.

5. Project Partners

Food Hub is an Ecotrust project made possible by the generous support of multiple parties.

Ecotrust has received financial support from the Annenberg Foundation and the Oregon Department of Agriculture and is actively seeking additional project funding partners.

Ecotrust also works in close consultation and collaboration with a wide range of organizations each of whom have commented on early design concepts or more recently informed the project's work plan and business requirements. The list grows daily, thus these organizations include but are not limited to: Eugene Water & Electric Board, Good Company, the Procurement and Distribution Workgroup of the Oregon Farm to School & School Garden Network, Sustainable Connections, THRIVE, 21 Acres, Willamette Food & Farm Coalition, Gorge Grown Network and the Oregon Center for Environmental Health.

6. Project Staffing and Oversight

The successful planning and implementation of this project is the responsibility of the Ecotrust Food & Farms team and select project funders and partners. The Project Lead, Erika Polmar, is responsible for providing day to day project management and maintaining relationships with internal and external stakeholders. She will sign-off on key decisions and ensure the project is completed on time and within budget.

At the onset of the project an Advisory Board of key partners and stakeholders may be created. Presently team members and content stakeholders include:

Deborah Kane: Vice President, Food & Farms, Ecotrust

Mike Mertens: Director of Spatial Analysis and GIS Manager, Ecotrust

Cory Schreiber: Farm to School Manager, Oregon Department of Agriculture

Megan Kemple: Oregon Farm to School & School Garden Network, Procurement and Distribution Workgroup, and Willamette Farm & Food Coalition.

Please note that this list is not all inclusive; it will grow.

7. Available Technology Resources/Integration Issues

Much of the original content for the site will come from the existing farmerchefconnection.org. New content will be identified through interviews and user focus groups. We do not have existing e-Commerce systems, web forums or other tools that must be integrated into the new site.

Farmchefconnection.org was originally developed on the Plone content management system (CMS) however Plone lacks the flexibility required for the application to evolve to the tier II or tier III levels. Plone does provide necessary features required for the Tier I level out of the box including user account and session management. However it became obvious that integrating additional functionality and server tools into Plone would require a significant amount of custom coding. We envision development to occur within an application framework that is capable of abstraction of databases and that provides support for geographic functionality including simple spatial queries. In addition to providing administrative tools that will allow managers to dynamically update the web site as well as extract data the application framework will need to be able to integrate software tools

Ecotrust is committed to using open source technologies and most of our applications have been designed, developed and implemented with such technologies in mind. Most of our existing applications are database driven (PostSQL), often with a spatial component (PostGIS). As such the technology used in the development of Food Hub should be fully interoperable with our existing systems and should support the design of dynamic websites that are based on highly structured databases. Furthermore, the system will need to be scaleable to Tier III and therefore have the capacity to integrate existing software including (but not limited to) spatial tools such as MapServer, FeatureServer as well as other third party logistics software systems.

8. General Product Requirements

Food Hub must be robust, scaleable, reliable and easy-to-maintain. Data storage, security and accessibility are key to the success of this project. We also require a database-driven administrative tool that will allow key site managers to easily update and extract data in various forms. The site must satisfy the needs of a diverse audience with varying degrees of technical expertise and screen time. It must accommodate constantly changing information and inventory and be easy to maintain.

Ecotrust, in collaboration with key funders and partners, maintains ultimate editorial control of content, without significantly delaying the publishing of new information on the site. Individual users (members) of the Food Hub network will contribute data and content preferably by using a system with a browser-based user interface. Administration of web content will be based on roles to control access and work flow. It is of the utmost importance that our site be safe and secure, intuitive, informative, quick to load and operate.

We intend to fully utilize web-based technologies to cultivate a network of local buyers and sellers in an easy-to-use marketplace. We seek to build member loyalty while enhancing customer relationships, increasing partnerships, building brand identity, and creating business efficiencies for our partners and members.

9. Scope, Specifications & Guidelines

a) Business Objective

Food Hub's business model is dependent upon delivering a cost-effective tool for buyers and sellers to find one another, communicate and conduct transactions that result in local food being purchased in the local marketplace. The website has the following clearly defined goals:

- Provide food producers, processors and manufacturers with a simple way to provide general information about their business and organize and publish their available products.
- Provide food buyers with a simple way to provide general information about their business and to access information about food producers and order products based on specific requirements (e.g. certification, proximity, price).
- Simplify the ordering, purchasing and delivery process.
- Provide tools for buyers and sellers to form new partnerships.
- Support multiple mechanisms for communicating with outside data systems.
- Log traffic patterns, user connections, and transactional records for outside analysis.

The anticipated key users of this website include food producers (farmers, fishers, food processors and manufacturers, ranchers), food buyers (restaurant chefs, caterers, grocery retailers, institutional purchasers such as schools and hospitals), distributors and the general public. Although there is significant overlap in the ways each group will interact

with the site, understanding the motivations and addressing the specific needs of each group will be critical to the success of this project.

b) Audience

Producers

Producers are typically small – mid sized farms that are now or would like to be in the future selling their products in wholesale quantities to buyers ranging from small, local restaurants to larger institutional buyers such as hospitals and universities. This group may also include farms seeking to sell raw ingredients to value added food processors and manufacturers and/or their products to large food distribution companies. Producers may also use Food Hub to solicit interest in forward contracts wherein they agree to grow certain crops for specific buyers well in advance of harvest time. The fundamental tasks associated with this user are:

- Discovering information on the site that encourages membership and active participation.
- Enrolling as a member resulting in a detailed profile that provides basic contact information, details of production practices, and product available.
- Maintaining and updating their profile with specific product availability, pricing and delivery options.
- Researching potential buyers by searching the database for specific buyers based on, for example, type (caterers), proximity (within 100 miles of the farm), amount typically bought (show only those that buy 100 cases or more) and delivery mechanism (show only those that accept Tuesday direct deliveries), etc.
- Tracking order status.

Buyers

Buyers seek to purchase products from producers in wholesale quantities. This audience segment includes buyers for institutional cafeterias, consumer markets and chefs for restaurants large and small. As market pressure encourages buyers to purchase local food, finding reliable, high-quality producers has become a significant priority for these individuals. The primary tasks associated with this user are:

- Discovering information on the site that encourages membership and active participation.
- Enrolling as a member resulting in a detailed profile that provides basic contact information, details of supply needs, delivery preferences.
- Maintaining and updating their profile.
- Researching potential sellers by searching the database for specific sellers based on, for example, products (apples), based on certification (show only those who are certified organic), proximity (show only those that are 100 miles from my location), quantity available (show only those who have 100 cases in stock now) and delivery mechanism (show only those who work with SYSCO).
- Tracking the status of product availability or order status.

Distributors

Distributors are the third-party entities who manage the distribution logistics of food from producer to buyer. Their involvement with Food Hub shall most likely be limited until the implementation of Tier III. In the initial phases of implementation distributors may be receiving purchase orders or invoices specifying pick up and delivery information from which they will execute. The tasks associated with this user will evolve as usage of the site increases. The primary needs are:

- Ability to obtain information regarding all aspects of an order.
- Access to update the site with the status of an order so involved parties receive timely notification of their order.

General Public

As Food Hub's mission is that of a wholesale marketplace, public involvement will be limited. However guests to the site should be able to easily find information about the projects mission, vision, service offering and partners.

Administrators

Food Hub administrators will provide support to users of the system as well as monitor usage, anticipate issues, and identify areas for growth and improvement. Administrators will have the ability to delete and modify user profiles and inventory as well as pending orders. Administrators will have unfettered access to data gathered from the site including user profiles, transactional data, site traffic and usage statistics. Specifically an administrator must be able to conduct these tasks easily:

- Collect payment from members for services rendered.
- Secure sign off from members on terms and conditions of Food Hub membership.
- Access a user profile to modify, delete or assist a user.
- Remedy user issues ranging from password resets to order modification.
- Receive notification of user problems or system abuse.
- Broadcast messages to all or subsets of users.
- Access and generate reports for analysis from all data gathered by the site including user profiles, transactional data, site traffic and usage statistics.

c) Development Phases & Service Offerings

This RFP is soliciting proposals from qualified firms to build Food Hub up to the Tier II level of service as described on page 2. Building Food Hub to Tier II functionality corresponds to Phase 1 (a & b) of development. Tier III functionality will be built in Phase 2.

Phase 1a

Tier I is at its most basic level a directory of food producers and food buyers with, on the producer side listings of product availability and on the buyer side anticipated procurement needs. Buyers and sellers utilize online tools to input and maintain business profiles which provide details such as contact information, certifications held, products available for purchase, pick up and delivery information. At this service level it is our goal to keep barriers-to-entry low to ensure that a large community of buyers and sellers actively participate. Tier I service does not offer online commerce, however it does provide a sophisticated forum for researching and connecting potential partners.

Searching for product will be the most active and important feature in Tier I. Basic searches by producer, product, availability and location must be easy to access and produce reliable results. The resulting list must allow buyers to navigate easily to producer profiles where they will find contact information and instructions on how to complete the transaction. Likewise when food producers conduct buyer searches, the results must allow producers to navigate easily to seller profiles. Searches available to the buyer should be mirrored by searches available to the seller. And in either case, the results list generated should be available for quick and easy printing as a pdf, or saved as a preferred search.

Specific searches that a food buyer might conduct include:

Search by Producer: Buyers will search for a particular producer by company name, contact name, zip code radius or "Search all."

Search by Keyword: Buyers search for a desired product based on the name of the product and are directed to a listing of all producers who have current availability of the specified product.

Search by Zip Code Radius: Buyers search for producers within a certain radius of a particular zip code. They may enter a particular zip and select the miles, or they may accept the default zip code which is determined at the time of log in. The results only include producers within the designated radius.

Search by Product Category: Buyers may find products by categories that include produce, meat, poultry, dairy, eggs, seafood, baked goods, confections, perishables, non-perishables, floral and even further levels of detail such as specific varieties of apples within the produce category, for example.

Search by Certification: Buyers may find products and producers by type of certification including organic, biodynamic, transitional, no spray, fair trade, free range, cage free, grass-fed, grain-fed, wild seafood, farmed seafood, USDA grades, National School Lunch Requirements, for example.

Search by Delivery: Buyers may find products based upon producers' delivery methods and schedule.

Search by Order Terms: Buyers may find products and producers based on their order terms including minimum order requirements and payment terms.

Specific searches that a food producer might conduct include:

Search by Buyer: Producers may search for a buyer based on company name, contact name, zip code radius or “search all”.

Search by Keyword: Producers may search for a potential buyer of a specific produce based on the name of a product, they would be directed to a listing of all buyers who are currently seeking the specified product. Searches might also be conducted based on type of buyer, e.g. all caterers in a 100 mile radius of the operation conducting the search.

Search by Zip Code Radius: Producers may search for buyers within a certain radius of a particular zip code. They may enter a particular zip and select the miles, or they may accept the default zip code which is determined at the time of log in. The results only include buyers within the designated radius.

Phase 1b:

At the Tier II level of service, Food Hub allows for basic one-to-one transactions, helping buyers select sellers who meet their requirements for product, insurance coverage, delivery schedule, food safety and handling criterion, etc. The goal is to facilitate transactions with the implementation of a shopping cart system that supports purchasing product from an individual producer. It is a one-to-one system and does not include aggregated purchasing or distribution.

This phase would not specifically involve ecommerce although ideally it would include standardized purchase orders and invoices – tools that are not currently in place for many small farmers who seek relationship with larger institutional buyers.

Phase2: Tier III:

Building upon the commerce engine created in Tier II, this service level would allow product bundling and delivery options. A buyer may request specific quantities of product from multiple growers and conduct only one transaction to acquire product from multiple producers. Third party trucking and warehouse operators will handle inbound deliveries, cross dock and order staging. Please note: Food Hub is not intended to replace existing distribution models.

d) Platform

Food Hub must operate on a robust, scaleable, reliable platform that meets the needs of a wide audience and in the future easily integrates with legacy systems of larger producers and distributors. Although we are open to exploring all viable platforms, Ecotrust favors platforms created in open source that are actively supported and bolstered by a large community. The platform must offer the ability to allow different users to be assigned different roles and permissions as well as offering end users and administrators the ability to modify content through a web-based interface. Site content includes text, images, profiles and inventory. Maintaining a consistent appearance and format across records is of the utmost importance. This will be most apparent in the area of product entry and inventory availability by producer. Food Hub must operate easily across computer platforms and web browsers and should meet the standards of Web Content Accessibility set forth by the W3C including accessibility to mobile devices.

e) System Support

All visitors to the Food Hub site should have access to instructions and a demonstration of how Food Hub works and how Food Hub will be beneficial to their business. Ideally this would come in the form of a brief, quick to download tour of the site. A user forum with a detailed FAQ maintained by the site administrator is also desired as a first line of user support. Email and phone will act as secondary channels for producers and buyers to receive site help from the site administrator.

10. Timeline

- This RFP is dated November 25th, 2008.
- Proposals are due no later than **5pm PST on Monday, January 5, 2009.**
- Questions to clarify any aspect of this proposal may be submitted in writing to erika@ecotrust.org from November 25- December 5. Responses will be posted online on December 8th.
- Proposals will be evaluated immediately after the submission deadline. During this time we may require interviews at our office with our evaluation team from January 7-14th. You will be notified if this is requested.
- Selection of a firm will be determined and announced on or about January 20, 2009.

- Phase 1a: Must be completed and delivered by April 15, 2009.
- Phase 1b: Deliverable dates shall be determined during Phase 1a implementation.

11. Budget

Please provide detailed cost proposals to accomplish the scope outlined in Section 9. The budget must encompass all design, production, and software acquisitions necessary for development and maintenance of the web site.

List pricing for:

- Phase 1a: Discovery, Requirements Planning, Site Definition & Tier 1 Development Testing and Deployment
- Phase 1b: Continued Site Development, Testing and Deployment to accomplish Tier II.
- Hosting: Recommend a host and estimate costs associated with hosting agreement.

12. Qualifications

- List the products your firm has produced 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/products that are live will qualify during evaluation.
- Describe your experience in working with non-profit and/or community-focused projects.
- Provide current reference information for three former or current clients.
- Briefly describe your firm's organizational capacity to produce our web site.
- Provide a detailed company profile that includes length of time in business and core competencies.
- Describe the percentage of your staff time that will be allocated to this project relative to your entire project load.
- Provide a detailed description of the team assigned to this project including roles and previous experience.
- Briefly describe your firm's project management process.
- Please disclose any hardware/software vendor partnerships.
- Describe your testing and support plan.
- Explain your service level agreement structure.
- Describe your process to include input from all program areas & partners.
- Detail any terms and conditions that would impact the success of this project.

13. Proposal Guidelines & Evaluation Criteria

- This is an open and competitive process.
- Proposals received after **5pm PST on Monday, January 5, 2009** will not be considered.
- 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 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 will perform must be defined. Ecotrust reserves the right to approve all sub-contractors assigned to the project.
- 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.

Proposals 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 the proposal and references.
- Aesthetic Capabilities – Prior work demonstrates artistic and innovative, 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 proposer. As a non-profit institution, Ecotrust is able to accept pro bono service and recognize the provider to the full extent allowed by the Internal Revenue Service.
- Depth and Breadth of Staff – The 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.
- Demonstrated commitment to high service level agreements and customer service.

14. Format for proposals

- The proposal must contain the signature of a duly authorized officer or agent of the company submitting the proposal.
- Discuss your proposed solution, including the features, benefits and uniqueness of your solution. Address your ability to deliver the project in the timeframe outlined in Section 10.
- Provide the information on qualifications requested in Section 12.
- List budgets. Identify staff you anticipate working on the project and their hourly rates for work that may be needed for Phase I and Phase II.
- Provide information on hosting, data security and storage. Including the following questions:
 - o How often will data be backed up?
 - o What is your primary code repository framework?
 - o What is the anticipated down time?
 - o How often will software/hardware be updated
 - o Describe your technical support.
 - o Describe in detail security of data
 - o Outline your methodology and service level agreements.
 - o Provide pricing, terms and conditions.
- If you do not provide hosting, please identify your preferred vendor/partner to provide this service.
- Proposals should be delivered electronically to the address listed in Section 15.

15. Delivery Address

Deliver proposals by email to epolmar@ecotrust.org

If a paper copy is necessary, please use duplex printing and deliver to:

Erika Polmar
c/o: Ecotrust Food & Farms
721 NW 9th Avenue, Suite 200
Portland, OR 97209-3448