



PORT BLAKELY
COMPANIES

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P: 206-624-5810 F: 206-624-9745
1325 Fourth Ave., Suite 1000 Seattle, WA 98101-2524
www.portblakely.com

Eddy Family Website Redesign Project Request for Quote (RFQ)

Paul Byrum, PMP

IT Project Manager

Email: pbyrum@portblakely.com

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Change Control

Version	Change	Who	Date
2.1	Added a report for tracking who logs in	Paul Byrum	8/28/12
2.2	Edited terms and conditions.	Paul Byrum	8/29/12
2.3	Minor edits	Paul Byrum	8/31/2012
2.4	Edits from Lindsay	Lindsay	9/6/2012
2.5	Edits from Greg Trapp	Greg Trapp	9/11/12



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1 Description of this Document

The purpose of this document is to solicit vendors to provide a cost and time estimate to redesign and redevelop an existing secure family website. The cost and time estimate will be used to prepare a 2013 Project Budget. At a later time in 2013, there will be an invitation for vendors to submit a proposal to develop the website.

Port Blakely (PB) Companies is conducting a project named “Eddy Family Website Redesign Project”, and the requirements below will guide the vendor to provide an estimate. The functional requirements describe the components, content, and the user’s experience on the website. Non-functional requirements describe requirements related to performance, security, reliability and other areas.

2 Background

Port Blakely Companies has been a family-owned private business for more than a century. The Eddy Family owns the business and they are the primary user of the current website. Family members can be elected to the Eddy Family Council and the purpose of the Council is to facilitate communication and company direction between family members and the Port Blakely Board of Directors. The primary use of the current site is a repository for family and Family Council information which includes:

- Eddy Family profiles, e.g. names, addresses, contact information, work experience, education, skills, etc.
- Contact information for Family Council and Board members
- Family Council news, meeting minutes and governing handbooks
- Family events, e.g. meetings and birthdays
- Family policies and constitution
- Family photos and videos
- Port Blakely Companies news

The current site has served the family well for many years, but over-time it has lost its effectiveness. Many problems exist:

- Hardware and back-end software that run the website are old and not supported. The site is hosted currently at a local ISP.
- Only one person can update content and documents.
- Navigation is poor.
- It is difficult to find people and documents.
- No document management for the many documents on the site.



- Ancient design.
- Not scalable.
- Visits to the site have declined.

Overall, the site appears to be stagnant, dark, gloomy, dismal, and generally not appealing. On average, about 19 out of 150 family members have visited the site in the last 6 months.

3 Purpose of the Website

The purpose of the site is to provide an interactive online meeting place to connect the Eddy Family Assembly members with one another, their Family Council Representative and with their company.

4 Objectives

Objectives of the project include:

- Increase visitors to the site by 50% 1 year after launch
- Increase the efficiency (time and ease of use) of updating content by 50% after 1 year to go live
- Allow selected users to update 100% of the site's content when the site goes live

5 Goals of the Website

Create a private and secure website that provides an interactive online meeting place to connect to the Eddy Family Assembly members, as well as effectively communicates the history, present, and future of the Eddy Family.

5.1 Short-Term Goal

Our short-term goal is to make the website usable, informational, and easily updated by users. The site should be an extension of the Eddy Family, where the site represents the family as:

- Dynamic and friendly
- Progressive and modern
- Clean and green
- Contemporary

5.2 Long-Term goals

Looking out 5 to 7 years, our long-term goals for the website include:

- A reliable source of information for and about the Eddy Family
- The Site effectively conveys who they are, what they do, and what they believe in



- The platform for the website should be scalable and flexible for future changes

6 Background of Port Blakely Companies

The headquarters office for Port Blakely Companies is based in Seattle, WA. The company consists of four divisions:

- Port Blakely Tree Farms – Owns and manages forestland in Western Washington and Western Oregon;
- Port Blakely Communities – Designs and develops residential and mixed use urban communities;
- Blakely Pacific, Ltd. - Located in New Zealand, the division owns and manages forestland on the north and south islands;
- Pacific Lumber and Shipping – Exports logs and lumber to customers in Japan, South Korea, China.

For more information about Port Blakely Companies, visit this site www.portblakely.com.

7 Audience Summary

The potential audience or visitors to the new site would include:

- The Eddy Family
- Port Blakely Companies Employees
- Outside board members

See [Appendix A](#) for profiles and demographics of the audience for the new site.

8 Functional and Non-Functional Requirements

8.1 Key to Priorities

- High priority = Must have
- Medium priority = Should have
- Low priority = Nice to have

8.2 Requirements

Below are functional and non-functional requirements:



Table 1: Requirements

ID	Description	Area	Priority	Cost Estimate	Comments
1	The website must be accessible to all Family members. Age of users ranges from 5 years to seniors (65+).	Accessibility	High	No cost estimate needed	
2	The website's data in its database must have the ability to be backed up and restored.	Backup/Restore	High		
3	The website should include a blog, which an individual or a group of users can record opinions, thoughts, information, etc. on a regular basis.	Collaboration	Medium		
4	The website shall track what Family unit holders should receive documents. For example, a family member can indicate what type of tax documents would be delivered to tax accounts, trustees, financial advisors, attorneys, and others. This would also include the number of copies and format of the documents, like PDF, Word, or Excel. The family member would only be allowed to make these changes and update addresses to the recipients.	Reporting	High		Price out separately
5	The website should have the ability to notify users when new content or documents have been posted on the site.	Collaboration	Medium		
6	The website should show announcements on its home page, e.g. birthdays, family council meetings, and family events.	Collaboration	Medium		
7	The website should display Family past, current and future events in a calendar. For example, meetings, birthdays and other events.	Collaboration	Medium		
8	The website shall have the ability to e-mail all account holders or selected Distribution lists.	Collaboration	High		
9	The website should allow voting and commenting on specific content. For example, allow visitors to vote on the photo of the month on the home page.	Collaboration	Medium		
10	The website shall provide users with the option to turn on and off email notifications from the site. Notifications include event reminders,	Collaboration	High		



ID	Description	Area	Priority	Cost Estimate	Comments
	document changes, and changes to content on pages.				
11	The website's content shall be editable by users with site contributor permissions.	Content	High		
12	The website shall include a feature to search the site's pages and return results so users can find documents and content.	Content	High		
13	The website may indicate what content is new on the home page.	Content	Low		
14	The website must prevent certain documents from being downloaded.	Content	High		
15	The website shall display Board of Director bios. This would include the following: Name, contact information, head shot image, professional associations, and experience.	Content	High		
16	The website should display the Family's logo on the home page and other appropriate pages.	Content	Medium	No cost estimate needed	
17	The website should have an ability to share photos in the following formats, jpg, png, and gif with sites like Flickr.	Content	Medium		
18	The website shall provide a link to Port Blakely Companies' news page, http://www.portblakely.com/news .	Content	High		
19	The website's home page shall display a photo of the month on the Home Page.	Content	High		
20	The website should allow videos to be posted and played. Videos would be in QuickTime format.	Content	Medium		
21	The website should display news about Family members. This would include news about marriages, births, deaths, and Family legacy.	Content	Medium		
22	The website should display an interactive family tree of the Eddy Family.	Content	Medium		
23	The website should allow users with the appropriate permissions to add delete, and edit members from the family tree.	Content	Medium		
24	The website should display bios of Port Blakely Companies' management	Content	Medium		



ID	Description	Area	Priority	Cost Estimate	Comments
	team.				
25	The website must allow site contributors to upload, edit and delete documents. This capability would be based upon permissions. By default, all documents shall be read-only for all users. Documents like Family Council Chair handbooks, strategies, policies, causes, forms, minutes, constitution, and materials from Annual Unitholders Meetings (AUM). These are PDF, Word, Excel, and PowerPoint files. Dates and who posted the document shall be displayed.	Document Management	High		
26	The website must be flexible enough to add features and carry forward any customization to the next version.	Extensibility	High	No cost estimate needed	
27	The website must allow users to edit their own Family profile information, but a user will need administrator permissions to delete and add other Family profile information. Family profiles would include the following fields: First Name, Last Name, Middle Name, Gender, Address, Contact Information, Birthdate, Work Experience, Education, Skills and Hobbies, who is the Family Council Representative, and other Family information. In addition, each user for Family member will be assigned one of the follow statuses: 1. Port Blakely Companies Member 2. Family Assembly Member 3. Outside Board Member	Family Profiles	High		
28	The website shall include a profile search, so any profile or registered account can be found by using text strings as filters like:	Family Profiles	High		



ID	Description	Area	Priority	Cost Estimate	Comments
	1. First name 2. Last name 3. Family Council Representative 4. Birthdate 5. Constituents 6. City and state of residence				
29	The website must have a consistent "look and feel".	Look and Feel	High	No cost estimate needed	
30	The website shall use Port Blakely Family styles and colors for pages.	Look and Feel	High		
31	The website shall have intuitive navigation.	Navigation	High	No cost estimate needed	
32	The website must use MS SQL Server for storing data. Note: Data for the Family profiles is currently stored in MS SQL Server 2005.	Platform	High		
33	The website must be available 99% of the time.	Reliability	High	No cost estimate needed	
34	The website must provide an interface with Google Analytics for web statistics and analytics.	Reporting	High		
35	The website should offer users a capability to build ad-hoc reports.	Reporting	Medium		Price out separately
36	The website shall provide standard reports that show: • Birthdays • Contact information • Mailing addresses for creating mailing labels • Contacts by family council representative • Who logged in • How many times a user logged in • When they logged in • Family council information with their constituents. Formats would be PDF and MS Excel.	Reporting	High		
37	The website shall provide reports that show what and when Family addresses	Reporting	High		



ID	Description	Area	Priority	Cost Estimate	Comments
	have changed in the last month.				
38	The website must support 150 concurrent users now and be able to support 5% user growth annually.	Scalability	High	No cost estimate needed	
39	The website must provide at least 128-bit HTTPS (Hypertext Transfer Protocol Secure) encryption when information is being transferred over the internet.	Security	High		
40	The website must provide individual user accounts with user passwords stored in an encrypted format.	Security	High		
41	The website's data, content and web pages must be secured from unauthorized access. The login page can be accessible by the public, but the site's web pages must be secured from unauthorized access.	Security	High		
42	The website shall be developed following the security guidelines from the Open Web Application Security Project (OWASP). The website must be secure from the following threats: 1. Injection 2. Cross site scripting 3. Broken authentication and session management 4. Insecure direct object Reference 5. Cross-site request forgery (CSRF) 6. Security Misconfiguration 7. Insecure Cryptographic Storage 8. Failure to Restrict URL Access 9. Insufficient Transport Layer Protection 10. Un-validated Redirects and Forwards Reference: The OWASP Top 10 (2010) Security Threats.	Security	High		
43	The website must support "strong" passwords when logging in. A strong password is: 1. At least eight characters long 2. Does not contain a user name and real name	Security	High		



ID	Description	Area	Priority	Cost Estimate	Comments
	3. Does not contain a complete word 4. Different from previous passwords 5. Contain uppercase letters, lower case letters, numbers, and symbols found on the keyboard				
44	The website shall include the ability for users to automatically recover their user names and reset passwords.	Security	High		
45	The website shall allow users to indicate what profile information they want to keep private. For example, phone, address, birthdate, education, skills, work history and email address.	Security	High		
46	The website shall have an inactive login session shall timeout after 10 minutes of inactivity.	Security	High	No cost estimate needed	
47	The site must use the same address as the existing site: https://www.pbfamily.com .	Usability	High	No cost estimate needed	
48	The website should only support the English language.	Usability	Medium	No cost estimate needed	
49	The website must support the following internet browsers: Safari, Google Chrome, Firefox and MS Internet Explorer (IE7, IE8 and IE9)	Usability	High		
50	The website must be accessible on mobile devices and tablets. If there will be a difference in cost for a desktop version, please provide two cost estimates, one for mobile devices and the other for desktops.	Usability	High		Price out separately.
51	The website must provide standard help/support page with appropriate contact information.	Usability	High		
52	The website must display intelligent error messages that will handle errors gracefully.	Usability	High	No cost estimate needed	



<i>ID</i>	<i>Description</i>	<i>Area</i>	<i>Priority</i>	<i>Cost Estimate</i>	<i>Comments</i>
53	The website shall store past and present documents. Users will be able to open and read documents, like annual unit holder meeting materials, handbooks, and Family Council meeting minutes.	Document Management	High		
54	The website shall use a content management system (CMS) for maintaining and administrating site content, styles and permissions will be used. We prefer to use an open-source product.	Content	High		

9 Staff Resources

Point of contact is:

Port Blakely Companies
Paul Byrum, Information Technology Project Manager
1325 Fourth Ave.
Suite 1000
Seattle, WA 98101
Phone: 206-621-3297
Fax: 206-624-9745
pbyrum@portblakely.com
www.portblakely.com

We have a project team of technical and non-technical members that will be reviewing the cost and time estimates.

10 Terms and Conditions

Terms and conditions include:

1. Email the response to Paul Byrum, pbyrum@portblakely.com
2. Email by end of the day **October 8, 2012**
3. The quote must use the format outlined in this RFQ, see below the **Format for Response** section
4. Parties submitting separate proposals may not discuss pricing information or they will be ineligible to bid on the project in 2013



11 Format for Response

Follow this format for submitting responses:

1. Executive Summary:
 - a. A brief summary of how the estimate was derived.
2. Budget Estimate:
 - a. Provide an overall cost estimate based upon the requirements listed above.
 - i. If applicable, please provide a cost estimate for each requirement.
 - ii. **Note that not all requirements need estimates.** Some requirements don't need cost estimates, but these must be considered in the overall cost estimate.
 - iii. When responding back, please copy the table above with the individual cost estimates
 - b. Provide a cost breakdown for the following:
 - i. Maintenance and support:
 1. Identify any costs that should be assumed as part of the site and ongoing costs for maintenance and support.
 - ii. License fees:
 1. Identify any annual costs Port Blakely will need to pay for any third-party tools or services
 - iii. Training:
 1. Identify any costs to train users to use the site
 - iv. Other charge areas:
 1. Please identify your hourly rate for consulting and future work.
3. Time Estimate:
 - a. Provide an overall project duration (i.e. months and/or weeks).
4. Platform Summary:
 - a. Indicate if the solution would be an off-the-shelf or a customized web application.
 - b. Indicate if any third-party applications would be used.
 - c. If possible, a summary of a recommend platform, such as a database, operating system, and web application frameworks.
5. Attachments:
 - a. Biographies of all who will work on this quote
 - b. Professional references



12 Appendix A – Profiles and Demographics of Users

Users include:

- Board members
- Family members
- Current employees
- Outside consultants

Approximately 150 users access the current website.

Table 2: Profile of Users of the Site

Demographics	
Age:	5 – 65+
Sex:	Men and Women
Language:	English
Education:	Primary schools to Graduate
Location:	Washington, Oregon, California, BC Canada, New York, Hawaii, Montana, Idaho, Alaska, Michigan, Illinois, Quebec Canada
Technically Savvy:	Yes
Environmentally Aware:	Yes