

BASEEO, INC.

PROJECT - *TAKING CONTROL*

Request for Proposals (RFP)

October 28, 2013

Table of Contents

1.	Summary.....	2
2.	Description, Purpose and Objectives.....	2
3.	Scope & Guidelines.....	6
4.	Available Technology Resources / Integration Issues.....	8
5.	Audience	9
6.	Timeline	9
7.	Budget.....	9
8.	Staff Resources.....	10
9.	Contract Terms.....	10
10.	Proposal Guidelines and Requirements.....	11
11.	Qualifications.....	11
12.	Evaluation Criteria	12
13.	Format for Proposals.....	13

1. SUMMARY

BASEEO, Inc. – Project: “Taking Control” is accepting proposals to design and develop the company’s web database and update the existing web site. This will be a concept to completion production. The purpose of this RFP is to obtain a variety of solutions to aid in the expansion of our company’s operations and back-end support. In addition, we want to provide all candidates with the overall project vision and core requirements and a fair evaluation process. Successful completion of this project is crucial to launch of our business. Consequently, every detail and timeline will be monitored closely for accuracy and timeliness.

The existing Company web site was originally designed and produced in 2012 and modified slightly in 2013. The site is maintained with in-house resources.

Taking Control is a private and exclusive membership based company. Acceptance into the membership is by invitation only. All members and staff sign a confidentiality agreement prior to gaining access to company website and other materials. This website/database project is not designed to build a universal web presence. In fact our site is currently login and password protected and will remain that way for the foreseeable future. However, our site is designed to be a user friendly effective tool for board executives, staff and members to easily access information critical to carrying out their roles and responsibilities as well as build our brand and constantly communicate our vision, mission and goals internally.

2. DESCRIPTION, PURPOSE AND OBJECTIVES

Description

Create/redesign a flexible, informative web site that is easy to maintain. We must develop a user friendly site that can deliver large amounts of constantly changing information to our key audiences. Even more importantly, in addition to redesigning a user-friendly site with an intuitive interface, we must also develop a web-based, database-driven administrative tool that allows key management personnel to easily update content without directly accessing source code.

For legal reasons the Company will maintain ultimate editorial control of all content to ensure that we are compliant with all federal and state and other regulatory agencies relevant to our industry.

To be effective, our web site must be:

- *Easy and intuitive*
- *Visually pleasing*
- *Informative*
- *Safe and secure*
- *Quick to load and operate*

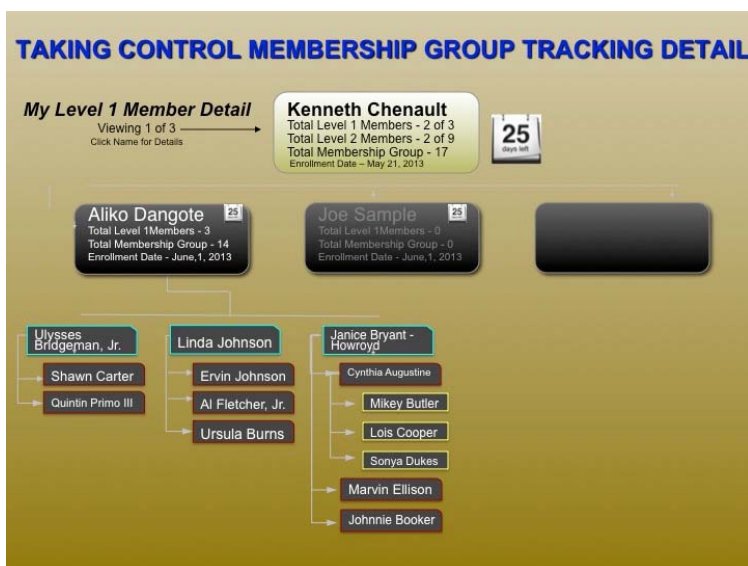
Purpose

Primary: The primary purpose of our web based database system is to provide a real time system that company executives and staff members can use to track and monitor membership/company growth as well as compliance with various company policies. **All members of the company are relational and must be linked one to another accordingly.**

We currently use formstack.com to enter our membership information. All data needed such as: name, address, phone number, email, identification number, etc. for the database is entered through that system. Although we are happy with the features, functions and benefits of Formstack and give preference to solutions that integrate with their system, we are open to other creative ways to obtain our ultimate objectives.

Listed below is an overview of a few key requirements of the database/website system:

1. Each member must have their own login and password
2. The portion of the site that the members see must contain an easy to read organization chart format of their entire membership group. See samples below:



(Total Membership View)



(Single Member Mouse Over View)

3. An automated email is sent whenever new members are added to or deleted from their membership group
4. Within that organization chart, members should be able to click on or move mouse over a name and get all relevant data and click to email.
5. Members should receive an automated email at benchmark times for all investors (i.e. 30 day, 45 days, 55 days...etc.)
6. All up line should receive an email when new members are enrolled in their membership group
7. Members and all up line should always be able to see the number of days remaining on probation or the number of days in the membership group
8. Database must pull from an outside source (excel format) members that meet a minimum monthly required purchase. Members not meeting the minimum required auto shipment receive an automated email. The system must also notify the company either by email or another internal reporting process.
9. Need capability to automatically deactivate logins and passwords when members are suspended and/or terminated. (Feature Currently in Place)
10. Suspended and/or terminated members may not recommend new members
11. Members and all up line are notified when member has less than three personally recommended/sponsored members on their first level and placed back in a probationary status
12. Interview Reporting Form –This form is linked to shiftplanning.com. Applicants must be in the interview system before they can be evaluated. Create interview database for cross checking. When entering name, phone number and email address system denies persons that have been previously interviewed

Secondary: The Company currently has a website with approximately seven pages that meets our basic need to provide information to our members. However, an opportunity exists to re-

engineer the site to better reflect the vision and mission of the Company and incorporate the latest web technology.

Upon completion of the development of the site, the Company will assume full responsibility for web site content maintenance and administration. All content, coding and graphics will become the sole property of the Company.

Objective

Our primary Internet objective is to provide a system that allows Company executives and staff easy access to information necessary to carry out their roles and responsibilities. Our database system is an essential part of how we track the growth of our company as well as compliance with company policies and procedures. We desire a system that automates as many of our processes as possible in order to run a more efficient operation and free our board executives and staff to focus on other portions of our operations.

In addition, we want to offer our members an easy and informative means of communication to stay plugged in to the up to date growth of the company. Taking Control is a private membership organization. We do not desire to have a strong universal web presence. All information contained on our site is private and exclusive to authorized members of Taking Control.

Specific Strategies

- *Increase awareness of the Company's vision, mission and strategy*
- *Obtain information necessary to maintain a real-time database of members in accordance to group relationships and compliance with key membership requirements*
- *Provide technical and operational support for staff to efficiently carry out their roles and responsibilities*
- *Improve business efficiencies*
- *Present comprehensive information and resources in an easy to use format*
- *Integrate brand messaging*
- *Deliver a consistent image*
- *Deliver a scalable, maintainable foundation*

In short we must tell our story through the use of compelling visuals, intuitive navigation, and concise messaging.

Make it easy

Redesign the site to deliver intuitive navigation, an improved graphical user interface, and easy-to-find content organization.

Make it compelling

Develop tools (database) to deliver timely, relevant answers to the breadth and depth of executive, staff and member questions.

Make it happen

Reinforce the Company's brand of exclusivity and excellence and increase member's sense of pride.

3. SCOPE & GUIDELINES

The scope of this project is to update the existing Taking Control web site. The company will create/provide all of the site content. A firm that can handle all site planning, interface design and production is required. The site must include a technology solution that allows the in-house staff to easily and cost effectively update content and modify site design after the initial launch.

Discovery:

- Confirm audiences, objectives, graphic look and feel, navigation, site marketing, technology issues and assumptions, required functionality, phasing, and budgetary constraints, resulting in a creative brief.

Design:

- Web site information architecture, graphic look and feel, user navigation, home page and main navigation templates for each of the main navigation links.

Development Guidelines:

The web site designed by the successful candidate must meet the following criteria:

- Create a content management system that will permit non-technical Company staff to instantly update web site content on specific pages.
- Easily Updated – Once the site has been completed and accepted by the Company, site will be maintained by the Company.
- Convert substantial amounts of existing content to new web site.
- 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 Company logo should be prominently displayed on every page as a common header.

- Consistent Design – As stated above, each section of the site should have a common look and feel. The use of photographs, fonts and layouts should be consistent throughout the site.
- Easy to Navigate – The site should be easy to navigate. Information should be grouped and presented in a logical manner and require no more than three levels of “drill down” for the user to find the desired information.
- Development of web pages to accommodate the proposed navigation scheme.
- Provide necessary software and licenses to maintain site internally or externally, as decided by the Company.
- Automated email responses based on defined criteria.
- Required Automated Reports/Notifications TBD
- Provide search capabilities using key words or phrasing.
- Gather e-mail, areas of interest and demographic information from members in a format that permits the Company to maintain a single user updated database of members and email each accordingly based on defined criteria.
- Provide training and all necessary support to permit easy use by a selected Company staff.
- Once the web site has been completed and accepted by the Company, the web site design and all of its contents, software and architecture become property of the Company.

Site Specifications:

The Company encourages creativity in the proposals submitted; however there are certain requirements for the web site project. Your proposal must account for all of these requirements.

- Site must be compatible with Google, Safari, Firefox and Netscape browser versions 5.0 and higher.
- Web site must not require plug-ins as a default.
- 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 1.0, provided by the W3C and should also be easily accessible to the novice as well as the experienced Internet user.
- Fast Loading Pages – The web site must be designed with a balance of text and graphics such that each page loads in 8 seconds or less on the average computer (using a 56K modem).
- Testing:
 - Testing of site on all applicable platforms to ensure web site works as promised.
 - Explain testing plan through development process.
- Delivery:

- o Delivery and uploading of site to client for internal hosting, to an outside third party, or hosting by consultant (to be determined).

Tracking:

- Implementation of tracking software to produce user defined site log reports. We need a tool to help us better understand and measure web visitor behavior and improve web site performance and availability. (This may be offered through hosting service.)

Web traffic analysis:

- o *Path analysis*
- o *Visitor trends*
- o *Page views*
- o *Entry pages*
- o *Top pages*
- o *Exit pages*
- o *Page – length of stay*
- o *Technical analysis: browsers and platforms*

4. AUDIENCE

Stakeholders and audience groups:

Primary: Executive Board, Staff/Independent Contractors.

Secondary: Members

5. AVAILABLE TECHNOLOGY RESOURCES / INTEGRATION ISSUES

We will use much of our existing web content.

There are no existing databases that will need to be imported or connected to the new site. However, we currently use FormStack and Shift Planning as key functions in our operations. All systems should be instigated with them and/or any system that is suggested to replace them must be as independent and user friendly as what is already in place.

6. TIMELINE

- This RFP is dated October 29, 2013. Proposers may also request a copy be sent via email by contacting Deatra Stevenson at deatra@mac.com. Please include in the subject line: Taking Control RFP.
- Proposals are due no later than 2:00pm/noon EST, Thursday, November 9, 2013.
- Proposals will be evaluated immediately thereafter. During this time we may require interviews at our office with our evaluation team. You will be notified if this is requested.
- The name of the candidate firm who has been selected will be decided on or about November 15, 2013.
- Negotiations will begin immediately with the successful candidate and should conclude no later than November 20, 2013.
- All other candidates will be notified on or about November 30, 2013.
- All candidates should be aware that the Company has a very aggressive internal timeline to complete this project. All deadlines will be confirmed during the negotiation phase.

7. BUDGET

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

List pricing for:

- Phase I: Database Development (backend) Testing and Deployment
- Phase II: Database Development (front face) Testing and Deployment
- Phase III: Site Re-design
- Hosting: We have not yet made a final decision to host on or off-site. Discussions during the discovery phase and your input and advice will help us make a decision in this regard.

8. STAFF RESOURCES

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

Project Lead: Responsible for overall design, content and requirements, sign-off on key decisions, providing project steering and maintaining relationships with key stakeholders (CEO, Board Members, Project Manager) – Deatra Stevenson.

Project Manager: Responsible for keeping the project on schedule and within the budget. Maintains communication between other team members – Damon Haynes.

9. CONTRACT TERMS

Taking Control will negotiate contract terms upon selection. All contracts are subject to review by company legal counsel, and a project will be awarded upon signing of an agreement or contract, which outlines terms, scope, budget and other necessary items.

10. PROPOSAL GUIDELINES AND REQUIREMENTS

This is an open and competitive process.

Proposals received after 2:00pm/noon PST, Thursday, November 9, 2013, 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. In your proposal please provide the name, address, and EIN of the sub-contractor. We will not refuse a proposal based upon the use of sub-contractors; however we retain the right to refuse the sub-contractors you have selected.

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

11. QUALIFICATIONS

1. List the five web sites 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 that are live will qualify during evaluation.
2. Describe your experience in producing sites with front face relational organization/membership charting and backend database projects.
3. Provide current reference information for three former or current clients (company name, contact person, position, phone number, address and email).
4. Briefly describe your firm's organizational capacity to produce our web site (e.g. staff, equipment, software, physical space, office location, etc.).
5. How many full-time staff does your firm employ? Please include a copy of your firm's organizational chart.
6. Provide a company profile, length of time in business and core competencies.
7. Briefly describe the percentage of your web staff that would be 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%.
8. 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.
9. Briefly describe your firm's project management process.
10. Please discuss your testing and support plan.
11. Please explain your service level agreement (SLA) structure.
12. Time frame for completion. The time frame for completion of the project will be evaluated.

13. In addition, time frames will be part of the contractual agreement; therefore, a realistic time frame for completion is requested.
14. 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.
15. Terms and conditions

12. EVALUATION CRITERIA

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

An electronic copy of your proposal must be received no later than 2:00pm/noon PST, Thursday, November 9, 2013.

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 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 the proposal and references.

Aesthetic Capabilities – Prior work demonstrates artistic and innovative, user friendly interfaces that engage viewers and significantly enhance the company's ability to track and query information to make decisions and automate processes that will maximize resources in other areas.

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.

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.

Demonstrated commitment to high service level agreements (SLA).

13. FORMAT FOR PROPOSALS

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

Length and Font Size:

Please use fonts no smaller than 10 point. Maximum proposal length including title page, cover letter, proposal, qualifications and budget should not exceed 35 pages (not including Hosting Attachment information).

Title Page:

BASEEO, Inc. Taking Control Web Site and Database Development Proposal, your company name, address, web site address, telephone number, fax number, e-mail address and primary contact person and position title.

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 (10-20 pages).

Budget and Fees:

List budgets as requested above. The budget must encompass all design, production, and software acquisitions necessary for development and maintenance of the web site and database.