

Berkeley Student Cooperative (BSC)

Request for Proposal

Web Site Re-Design, Development, and Hosting

March 7, 2011

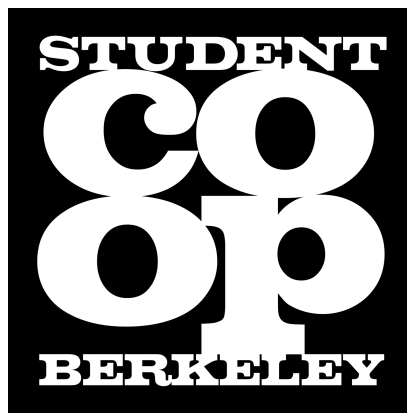


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1. SUMMARY

The Berkeley Student Cooperative (herein BSC) is accepting proposals to re-design, develop, and host the organization's website. This will be a straight-forward concept to completion production, with an emphasis on long-term flexibility and reliability. The purpose of this RFP is to provide a fair evaluation for all candidates and to provide the candidates with the evaluation criteria against which they will be judged.

The existing BSC website was created using the Joomla content management system in 2008 and has been modified, tweaked, and expanded ever since. The full history of the BSC's web presence is available on the webmaster's documentation site.¹

The BSC also employs a number of custom web applications, which are distinct from the Joomla site and are hosted on a separate domain. For a listing of the BSC's web assets, visit the webmaster's "Assets" documentation page.² A screenshot of the front page of the current web site is available at the end of this request and can be located at <http://berkeleystudentcooperative.org/>.

2. PROPOSAL GUIDELINES AND REQUIREMENTS

This is an open and competitive process.

Proposals received after **12:00pm/noon PST Monday March 28, 2011** 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. The BSC 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.

1 <http://bsc.coop/web/assets/bsc-website>

2 <https://sites.google.com/a/bsc.coop/bsc-web/assets>

3. CONTRACT TERMS

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

4. PURPOSE, DESCRIPTION AND OBJECTIVES

Purpose

There are many underutilized and absent features of our current site that are fairly integral to staff, board of directors, and general membership activities. There is little documentation on most of our applications and on the overall web site architecture. There is no sufficient description of how the site can fulfill users' needs (including but not limited to those of staff, work-shifters, managers, co-op members, board of director committees, prospective members, media, parents, alumni, and the general public). Further, the current configuration and organization of the web site is unintuitive and causes unnecessary labor to adjust and use properly.

Rather than trying to patch a site with a wealth of problems (of all levels of severity) and manage a wide range of very different web applications, it is in the BSC's best interest to re-define the purposes of the BSC website and web applications and, furthermore, implement a plan to re-design our web site to reflect these purposes. Upon completion of the re-design project, the BSC will assume full responsibility for web site content and administration. All content and code will become the sole property of the BSC, unless ownership conflicts with other preexisting licenses or agreements. The BSC is interested in contributing any significant developments back to the Free / Libre / Open Source Software community, which will be negotiated as necessary.

Description

Re-design the current BSC web site with our users in mind to increase its overall utility and to replace the functions currently served by separate web applications. The site must be navigable and usable for a wide range of users both external and internal to the organization. Raise visibility and public profile of the organization through standards-based development, intuitive work-flows for news and updates, dynamic content, social media integration, easy campaign site creation, and flexible/customizable design. A web-based CMS with a rich community of developers and support such as Drupal and Joomla or comparable software are desired.

The BSC will maintain ultimate editorial control of content, for which there should exist intuitive mechanisms for timely contributions from various users. Administration of web content will be based on roles to control access and work-flow. Technical administration outside the scope of site hosting services should be minimal but will be maintained by the BSC. Requires sufficient documentation and project training (in-person demos/workshops,

written materials, or multimedia content) to allow the BSC to properly train continuing and new staff as necessary in major aspects of the site.

Objective

The BSC requires a web site that is a sustainable solution to many information problems, serves many users, and is flexible for an ever-changing organization.

Our Vision

The BSC web site should be:

- Usable and accessible
- Organized and intuitive (on back- and front-end)
- Dynamic and easily updated
- A tool to collaboratively develop and publish content
- Safe and secure (administratively and for financial transactions like donations)
- Quick to load and operate

Long-term Goals from the BSC Strategic Plan³

- Assess and improve our mechanisms of retaining, documenting and conveying institutional knowledge
- Increase accessibility of our co-ops to prospective members
- Expand the role of member education in the BSC
- Strengthen the communication and cooperation between disparate internal groups to increase cohesion of the organization

5. TIMELINE

- This RFP is dated **Monday, March 7, 2011**. Proposers may also request a copy be sent via paper by contacting the BSC Webmaster at webmaster@bsc.coop.
- Proposals are due no later than **12:00pm/noon PST, Monday, March 28, 2011**.
- Proposals will be evaluated immediately thereafter. During this time we may require interviews at our office with our IT committee on or about April 12, 2011. You will be notified if this is requested.
- The name of the candidate firm who has been selected will be decided on or about

³ For more information, read the BSC Strategic Plan on page 1 of our policy document, the BSC Board Manual: http://berkeleystudentcooperative.org/images/policies/spring10_board_manual.pdf

April 26, 2011.

- Negotiations will begin immediately with the successful candidate and should conclude no later than May 3, 2011.
- All other candidates will be notified on or about May 17, 2011.
- Engagement work complete and web site live delivered by July 19, 2011.

Summary:

Request Provided	03/07/11
Proposals Due	03/28/11
Potential Interviews	04/12/11
Candidate Selection	04/26/11
Contract Negotiations Completed	05/03/11
(Other candidates notified)	05/17/11
Work Complete and Site Delivered by	07/19/11

6. 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.

Hosting will be addressed separately and costs for hosting are not included in the budget for this project.

List pricing for:

Project: Discovery, Requirements Planning, Site Definition, Development, Testing and Deployment.

Hosting: We will host off-site, preferably with a reliable, robust service that can accommodate for our various needs at a reasonable price. Discussions during this process and your input and advice will help us make a decision in this regard.

The BSC has allocated \$5,000 for this project. However, we will entertain responses for greater than \$5,000 if they demonstrate a discrete, itemized budget and plan. This is especially useful if creative proposals wish to highlight base-line services as well as a long-term vision aimed at future development and expansion. Hosting costs will be addressed

separately.

7. BACKGROUND OF THE BSC

Organizational Background

The Berkeley Student Cooperative (BSC) is a California nonprofit corporation exempt from tax under Section 501(c)(3) of the Internal Revenue Code. BSC was founded in 1933 by a group of 14 University of California at Berkeley students to address the reality that housing costs in Berkeley prevented many academically qualified students from availing themselves of the (then) free education provided at the University of California at Berkeley.

Since its founding 75 years ago, the organization has acquired or leased 20 properties near the Berkeley campus which provide cooperative room and board houses or apartments housing a total of 1,262 student members. Room and board costs of the BSC remain below 60% of the University's dorm rate for room and board, primarily because members are required to work at least 5 hours weekly in assigned workshifts, either to maintain and operate the individual properties where they live or to help core professional staff implement the business processes of the central office.

BSC members are responsible for the governance, fiscal soundness and day-to-day operation of the organization's 20 residential properties. The corporation's 29-member Board of Directors sets basic policies and oversees the centralized finances of the organization, including its \$9.5 million annual operating budget. Each of the 20 BSC-owned properties governs itself by means of a house council, house bylaws, and house leadership positions, subject to the overall policies of the organization's Board of Directors. Each of the BSC properties has a unique culture and identity.

A 20-person professional staff, a 26-person compensated part-time student staff, and a 60-person student "workshift" staff, each providing from 2 to 5 hours of work per week, implement the following business processes of the organization's central office:

- **HOUSING:** Marketing, processing applications, maintaining a waiting list, contracting with, making housing assignments and transfers for, or terminating contracts of the 1,283 student members who live in the 20 properties.
- **MAINTENANCE:** Overseeing and implementing recurring maintenance and repairs, as well as major renovations, monitoring for habitability, and providing professional staff support to house-level student maintenance managers at each of the 20 properties.
- **WAREHOUSE AND FOOD DISTRIBUTION:** Ordering, warehousing and distributing food to house-level kitchen managers, as well as furniture and supplies ordering and distribution.
- **FINANCE:** Collecting rent or room and board payments from individual members,

paying organizational expenses, allocating centralized revenue and expenses to individual houses or properties, producing financial statements, budgeting and cash predictions, and overseeing the financial condition of the organization.

- **COMMUNICATIONS AND DEVELOPMENT:** Maintaining the BSC web site; developing the use of Google Applications Education Edition for organizational communication and collaboration; marketing the positive image of the organization in the greater community, partnering with University and City of Berkeley officials on major initiatives, building alumni association membership, securing donations from the organization's 75,000 alumni, and other fundraising activities.
- **MEMBER EDUCATION AND SERVICES:** Educating members on the responsibilities and benefits of cooperative living, facilitating house-level leaders in creating a positive community at the house level, mediating member disputes, responding to the members' health and safety needs, and promoting a safe and healthy environment in the individual houses and properties.

The majority of the organization's 1,275 members provide their five-hour weekly workshifts at the individual property at which they reside, providing meal preparation, housekeeping, maintenance, governance, and management services that facilitate the successful and low-cost operation of each residential property.

Organization of the IT Function

1. **Staff.** The Executive Director is responsible for the overall administration of information technology. The organization has a part-time Communications Coordinator whose job duties include maintaining the externally hosted website and developing the use of Google Applications. A part-time member (student) position acts as Webmaster under the supervision of the Communications Coordinator.
2. **IT Consultants.** Web applications on the bsc.coop domain are hosted by InMotion Hosting. The Joomla website on the berkeleystudentcooperative.org domain is hosted by Dreamhost. The BSC contracts with an independent company, Uptime Resources, for ongoing network and desktop support.
3. **IT Committee.** A subcommittee of the Board's Capital Affairs Committee has been created to oversee planning and development of the organization's IT functions, including the BSC web site and web applications. It includes both BSC members, student leaders, an alumni seat, and key management personnel. Respondents to this RFP who are selected for further screening will have the opportunity to demonstrate their proposal to this committee.

8. USERS AND USE CASES

Primary users are in **bold and underlined**:

1. External

- a) **Prospective Members** – Defining this group more specifically is up to the Vice President of External Affairs, Board's External Affairs Committee, Recruitment Coordinator, Communications Coordinator, and others. This type of user should be defined and redefined in the future, as necessary. However, there are a couple clear general categories.
 - Looking for Housing – Students looking for housing, from several schools, of many types. Some want apartments, others want houses, still others desire both or either.
 - Looking for Boarding – Students looking for food. Probably local, somehow connected to the co-ops (e.g. significant other is a member), or looking for housing and trying to accrue semesterly seniority points (0.75 points for boarders) to get higher on our housing wait-lists.
 - Other – Other classifications exist, e.g. those seeking employment or work in exchange for rent (such as AB540 students who do not have social security numbers and thus face difficulty finding employment, but *can* get a member job in the BSC for rent credit). This may or may not intersect with one of the above categories.
- b) Parents, Guardians, Relatives, etc. – Either passively or actively investigating the BSC services including housing, boarding, and employment.
- c) **Media** – News outlets of all varieties, such as SF Chronicle, Berkeley Daily Planet, Daily Californian, TV News, CalTV, etc.
- d) Universities and Colleges (from local to abroad)
 - Administrators/Counselors/Staff – Ranging from investigating and gathering information to learning about our organization and referring/linking students.
 - Faculty/Lecturers/Teachers – Probably to a lesser degree, but also learning about us.
 - Campus Law Enforcement (e.g. UCPD)
- e) Law Enforcement and Regulatory Agencies (BPD, FBI, IRS, etc.)
- f) **Alumni** – Former co-op members who want information about the BSC, want to get involved with the Alumni association (BSCAA), want to donate, or who are already involved with the BSCAA and require specific resources.
 - The BSCAA has newly launched its own website through which it manages its

own announcements, event registration, membership, and resources.⁴

g) NASCO and NASCO members (North American Students of Co-Operation)

- The BSC belongs to a continental network of co-operatives and our information is available through the NASCO Guide.⁵

h) Outside Organizations (Non-profits, businesses, non-governmental orgs, membership orgs, housing orgs, co-operatives, etc).

- For Benefits – Seeking to connect to, provide resources for, benefit from, market towards, advertise with, or learn from the BSC.
- For Information – To use our resources for whatever purpose.

i) General Public – A catchall to cover most users who may not fit in one of the above categories. Though one should be wary of designing for the “public” without having specific details or users in mind.

2. Internal

a) **General Membership** – Those we classify as “members,” i.e. anyone with a BSC contract. Quite often looking for current member or housing-related information.

- Workshifters – Require access to some information on the website.

b) **Staff** – Our full- and part- time employees. Some of these users need to work on the administrative end, others as merely editors, and the rest at least the front-end, visible site.

c) **Board of Directors** – The body empowered to make decisions for the organization as a whole. The board is ultimately responsible for content, may request information be added or removed, and must access a substantial portion of information provided on the site.

d) **Student Staff** – Members who are hired to work for the co-op and in return fulfill some portion of their workshift requirements or receive rent compensation. Some student staff are required to work closely with the website and web applications, others prefer to, and even others use it to find information relating to their job or to complete some task(s).

e) **House- and Apartment-level Managers/Coordinators** – Ranging from major, compensated managers/coordinators like House, Kitchen, Maintenance, and Workshift, to others like President, Waste Reduction, Health Workers, Social, etc.

- Major Managers/Coordinators – A large number of critical resources are available on the website, but whether they are accessed/used/necessary is unclear. On the other hand, some managers are dependent on other applications

⁴ <http://www.bscaa.org/>

⁵ <http://www.nasco.coop/guide/node/254>

(such as the custom Workshift website⁶).

Use Cases

1. All “*External*” users above should be able to access the appropriate information they require, organized in the most flexible manner possible. Further, those who need to contact us or deliver information (from media inquiries to housing application or event registration) should find intuitive and simple ways to do so.
2. *General Membership* should be able to access more exclusive information, such as Workshift and Elections data. Membership-related information on the website is okay to be public, but important to have sections that address the specific needs and concerns of our membership (housing, events, member jobs, etc). Also, everything above.
3. *Board of Directors*, its *Committees* and its executive *Cabinet* should be able to publish information through the website easily and efficiently (with some mechanism for Board and Staff oversight). Also, everything above.
4. *Staff* and *Student Staff* should be able to administer or control some aspects of the site in whatever way reflects the purposes of their job (development director launching a campaign, webmaster changing the whole site, health education coordinator organizing a “Health Portal,” etc.). Also, everything above.

9. SCOPE AND GUIDELINES

Our site re-design requires an emphasis on:

1. **Usability** (general principles, few clicks to navigate, easy to locate contact info).
2. **Accessibility** (especially for reading devices for those with disabilities including physical mobility and vision).
3. **Standards-based design** (CSS layout, W3C standards, sustainable coding practices with in-line documentation, easily updated to future CMS versions, cross-browser compatible design, mobile device and print layouts available).
4. **Search Engine Optimization** (Optimized for google and other major search engines, sections/subsections all given intuitive links, permanent locations)
5. **Customization** (easily updated/upgraded content and style, multiple-site administration such as for campaign sites, intuitive editing interfaces with sufficient user permissions control).
6. **The Future** (designed to make upgrading/updating/back-ups painless, allow transfer

⁶ <http://workshift.bsc.coop/>

between users and administrators smooth, and site statistics enabled).

Necessary Features:

- Easy navigation management/administration, especially top navigation.
- Site styles that permit minor aesthetic adjustment as well as major renovations.
- User management and advanced privileges functionality.
- Ability for many users to build-up and tear-down entire sections, “portals” of the site and campaign-type sub-sites.
- Generate dynamic tables for organizing information (e.g. Our Co-ops).
- Ability for various users to create secure, dynamic forms on-the-fly.
- Aggregation and management of social media and on-site news updates.
- Intuitive work-flow for major upgrades and design changes (for administrator).

Site Specifications:

The BSC 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 cross-browser compatible with IE, Firefox, Chrome, Safari, Opera, and mobile browsers.
- 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 2.0, 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 to optimize CMS functions to provide minimal loading time for all connection speeds and browsers.

Testing:

Testing of site on all applicable platforms to ensure web site works as promised. Explain testing plan through development process (i.e. focus groups, etc.).

Delivery:

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 an intuitive 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 or google analytics.)

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

10. AVAILABLE TECHNOLOGY RESOURCES

- We will use most of our existing web content. New content will be identified and managed through the webmaster and various other staff positions.
- There is no need to import or connect any existing database to the new site.
- The e-commerce (donation) transaction service we currently use is Authorize.net, provided by our bank.
- We maintain two web hosting services, which may be used for development and/or testing purposes.
- We also have access to a local machine running virtual server software available for development/testing, but it does not permit remote access.

11. STAFF RESOURCES

There are three primary roles and a secondary tier of organizational support:

Primary Roles:

1. **Project Lead:** Responsible for communication and feedback with all outside stakeholders, as well as any development support. Maintains communication between other team members – Matt Senate (Webmaster).
2. **Project Manager:** Responsible for keeping the project on schedule and within the

budget – Jan Stokely (Executive Director).

3. **Project Steering Committee:** Responsible for major decisions and any alterations to project trajectory – IT Committee.

Secondary Tier:

1. Board of Directors
 - a) President – Daniel Kronovet
 - b) Vice President of External Affairs – Alex Ghenis
 - c) External Affairs Committee
2. Staff
 - a) Development Director - Madeleine Loh
 - b) Housing Supervisor – Betsy Putnam
 - c) Assistant Housing Supervisor - Sue Koller

12. QUALIFICATIONS

- 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.
- Describe your experience in producing sites for non-profit, student housing, housing, student, cooperative 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 (e.g. staff, equipment, software, physical space, office location, etc.).
- 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.
- 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 developments and other business ventures.
- Explain your business model.
- Please discuss any hardware/software vendor partnerships.
- Please discuss your testing and support plan.
- Please explain your service level agreement (SLA) structure.
- 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 the BSC will evaluate proposals. The mandatory criteria must be met and include:

A copy of your proposal (.pdf preferred) must be received no later than **12:00pm/noon PST, Monday, March 28, 2011**. 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:

IT Committee
Berkeley Student Cooperative
2424 Ridge Rd
Berkeley, CA, USA 94709

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 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, the BSC 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 web site and other collateral as a BSC 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.

- Demonstrated commitment to high service level agreements (SLA).

The BSC reserves the right to refuse a proposal for any or no reason.

14. 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 30 pages (not including Hosting Attachment information).

Title Page:

Berkeley Student Cooperative, Web Site Re-Design 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.

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 time-frame noted in Section 5.

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 for Phase I and Phase II.

Attachments: Hosting options/information:

- Do you provide hosting? If so, please provide answers to the following questions.
- How often do you backup?
- How often do you have down time?
- How often do you upgrade software/hardware?
- Please describe your technical support.
- Please describe your security.
- Do you have a high-speed, direct connection to the Internet?

- Please describe your methodology and service level agreements.
- Pricing, terms and conditions.

If you do not provide hosting, please suggest a vendor/partner to provide this service and provide answers to the above questions.

15. APPENDIX: SCREEN-SHOTS OF WEB SITE

