

# **Request for Proposal**

## **Web Site Upgrade & Interactive Technology Design**

### **Ministry Leadership Center**

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**MINISTRY  
LEADERSHIP  
CENTER**

## Introduction

The Ministry Leadership Center (MLC) is seeking a vendor qualified to plan, execute and deliver the ongoing upgrade and development of the MLC website ([www.ministryleadership.net](http://www.ministryleadership.net)) as well as the development of related interactive technologies (i.e. iPad and iPhone apps, video conferencing, etc.) The selected vendor must demonstrate solid project management experience, expertise with open source web development platforms specifically **Drupal**, and must understand and use best practices related to design, development and deployment of interactive technology. Said vendor will also demonstrate expertise in developing custom applications for the iOS and Android platforms.

If your organization is interested in submitting a proposal based on the guidelines outlined in the following pages, we request submissions by **5:00 p.m. (PT) on November 29, 2010** (see the *Proposal Checklist* at the end of this document).

If you have any questions regarding the RFP, you may schedule a time to speak with Jerry Chrisman, Owner, Grip Media, between November 17 and November 24, 2010. To schedule a call, please contact Mr. Chrisman at 503-467-4090. Limited access to the current web tool for proposal purposes can be granted by contacting Mr. Chrisman as well.

## Background

The Ministry Leadership Center (MLC) is the cooperative effort of six Catholic health care systems. Together we work to ensure that our shared Mission and Values remain integral to the decision-making process at all management and governance levels of our organizations.

The Ministry Leadership Center, grounded in the Catholic identity and tradition of its sponsors, forms leaders to sustain and deepen the ministry of healing. To form a community of leaders who articulate and integrate a Catholic understanding of the ministry of healing.

The MLC has designed and implemented a three-year experience-based formation program for more than 500 senior managers. In addition to the professional resident staff, we draw upon experts from across the U.S. to address specific curricula.

## **MLC Programs & Services:**

**Leadership Formation** – Formation is a creative, communal and cumulative process that promotes the development of health care leaders within the Catholic tradition. The MLC has designed and implemented a three-year experience-based formation program for more than 500 senior managers.

**Alumni/ae** - Ongoing formation for participants who have completed the 3 Year/12 Module Session Leadership Formation seminar.

**Mission and Spiritual Care Leaders** – Ongoing education and development for leaders in the Catholic health care system and community.

# Redesign Goals & Objectives

## **Technology Background.**

Being a knowledge and experiential based organization, the MLC manages a wealth of content and written materials for the organization and its participants. Prior to October of 2009, the organization materials were managed through paper reproductions and email attachments.

To respond to the needs of its membership, the MLC developed a robust online Content Management System based on the Drupal opens source platform. The system not only manages learning material documents, but also has custom made interactive tools. These tools allow for users to not only view materials, but take comprehensive notes on materials within the system. Other custom tools include community collaboration that produce “Best Practices” documents, known as (Action I Feedback), as well as a video viewing system which allows for instant participant written feedback.

Unless a demonstrative compelling reason is presented, the MLC wishes to stay with the Drupal platform because of its extensibility and the current foundation already established (*Please. No Joomla*).

The current technology was developed by a local boutique technology development studio. Due to the MLC’s growing technology needs, a vendor with more resources are needed to better respond to the myriad of projects planned in the coming year. The original developer will be staying on in a consulting role to help facilitate future upgrades, as well as liaison between the vendor and MLC.

## **Business objectives to be served by redesign**

MLC has now received the mandate and resources from its sponsors to move forward in developing the technology to be “Best in Class”. The MLC wishes to raise the interactive online tools to the highest level possible with current and emerging technologies (such as tablet computing).

The MLC wishes to enhance existing technology as well as extend the technology into the mobile space. The qualified vendor will demonstrate expertise in vertically integrating online interactive technology from web sites down through tablet computing and mobile phone platforms.

The MLC likewise needs a vendor who is nimble and has plentiful resources for timely development of new interactive tools. This is an important consideration as these projects requires a staff , not a freelancer.

### Conceptual Goals

- Highly useful and interactive tools for member participants.
- Demonstrate relevance and value of the interactive tools to membership.
- Support and facilitate members' leadership formation and learning.
- Build interactive tools and sites that are truly easy to use (think Vimeo.com or Apple.com)
- Eliminate technological and conceptual hurdles for use.
- Foster communication and collaboration between MLC members and participants.

### Practical Goals

- Build interactive tools that users will truly use.
- Tools that are usable with minimal training.
- Build interactivity that is intuitive.
- Easy accessible on a variety of platforms.
- Development where the end user experience is always the highest priority.
- Develop tools with extensive and usable help systems and support.
- Develop tools that are extensible and plan for the future.
- Tools that are easily and logically administered by internal staff.
- Continual and orderly implementation of new features.

# Description of Work

## Audience - Typical End User

The typical end user of the interactive technology are senior managers in large health-care systems. The user is typically between the ages of 45-65 and did not grow up using computers. All end users use computers regularly but are typically not considered “power-users”.

## Technology

MLC prefers to work with a vendor who are experts in open-source platforms in order to ensure maximal flexibility and sustainability over the long term. The vendor should demonstrate expertise in custom Drupal development as well as expertise in the areas mentioned below in projects. The current web tool is hosted using a LAMP stack with a RAID mirror configuration.

The web site currently functions correctly under Internet Explorer 6.0. Internet Explorer 6.0 is a consideration moving forward on new projects (see below).

## Technology Plan

In your proposal, please describe for us how you envision developing the various projects in both sequence, cost, and timelines. In other words, please provide for us a logical plan and rationale for implementation of the projects. All the technologies interrelate and they should work in concert with each other (i.e. the iPad version of the tools should not differ significantly in user - experience from the desktop version. Meaning the user should be able to accomplish the same goals regardless of platform). Also one tool should not hinder the use of another tool.

## Content

The current web site is primarily divided into 12 learning modules. This module structure will need to remain in place with any new development.

# Projects

Please provide estimates and bids on the following MLC projects:

## Usability Study

A usability study will be undertaken via surveying and actual evaluation on how the users use the current web site. The study will identify both the positive and negative reactions of actual use as well as identify desired features and suggestion for better usability.

The usability study must be tested on actual users who closely resemble the identified typical end user (see above). The study will be conducted on various platforms and operating systems.

The study will also review the current site design and organization of content. From the review the vendor will make informed recommendations on the site look and feel, branding, and the organization of content. This review will also influence which technologies to pursue and what areas of each tool that needs to be developed.

## Branding / Identity

Currently MLC's branding and identity needs refinement and consistency. This project will review MLC's current identity and propose refined design and identity standards, including logos (both primary and secondary), colors, typography and layout for both print and online media.

As an end result of this project, a "Corporate Style and Usage Guide" will be developed and produced by the vendor that applies to both print and online media.

The vendor is expected to have *on staff*, qualified branding experts as well as seasoned graphic designers experienced in corporate brand development.

## Web Site Theme/Skin/Look & Feel

The MLC would like to upgrade the current web site's look and feel. The new look and feel would be consistent and follow the lead of the rebranding and design project above.

**Goals:**

- Easy navigation.
- Better presentation of content.
- Better use of screen real estate.
- Keeping the ability for staff to edit content.
- Consistent branding.
- Consistent experience between operating systems and differing browsers.

**Upgrade Custom Web Applications**

The MLC web site has several custom web application developed on the Drupal platform. The tools currently will need ongoing maintenance and enhancements.

**Custom Note-taking Tool**

Needs to be converted to work with iPad.

**Action I Feedback Collaborative Tool**

The Action I Feedback tool is currently being piloted. Based on user feedback, the tool will require enhancements and new features.

**Video Note-taking tool**

Video Note taking tool is currently linked with the custom note-taking tool.

**NOTE:** While it is hard to anticipate needs for these tools for the future, please propose a budget for upgrading and maintaining current tools to the best of your ability.

**Events Calendar:**

The MLC may wish to build their own custom events calendaring system. Currently *CalendarWiz.com* is being used for events but ideally a system moved to Drupal would be ideal.

## Mobile Technology

The MLC would like the web site to be available and easily used on dominant mobile platforms. This will be achieved in 2 ways:

1. **Webkit** - Versions of the web site that work on iOS, Blackberry and Android enabled devices. These devices access the web site via WebKit browsers (i.e.: Safari, Chrome, etc). It is too early to tell yet for Windows Phone devices so this is not a requirement at this time.
2. **Custom Mobile Apps** - Custom built applications for both the iPhone and the Android platforms. The apps will use a method that centralizes data, meaning that if a user inputs notes from an iPhone app, then said note will appear on the web site version of the MLC web tool.

**NOTE:** the custom apps will perform the dominant functions of the web site:

- Access session module content
- Allow for note-taking on content
- Allow for participation in the Action I Feedback tool

## iPad Compatibility

Currently the web tools do not function completely on the iPad. The web site needs to function as much as possible on the iPad the way it does on the desktop. Currently the Note-taking Tool does not function properly on the iPad due to the way the OS handles pop-up windows and frames. A solution must be created.

This is a critical project because many high level executives are now using iPads within the organization.

## Group Collaborative Communication and Threaded Conversations

The MLC would like a system within the web site that allows groups to have threaded conversations with each other. There are a variety of approaches to this (i.e.: Drupal's Organic Groups), but the goal is to have an easy and seamless way that groups of individuals may communicate with each other on the web site with email duplication of all communication. Basecamp from [www.37signals.com](http://www.37signals.com) is a very good example of how the MLC envisions group communication.

We envision an area of the web site that is a hybrid between a message board, and Basecamps' messaging system or a "Wall" metaphor like Facebook.

### **Video Chatting and Conferencing**

We would like a vendor to research and propose a viable solution to allow for users to video chat with each other. There are *many* approaches to this feature. The overarching goal is that video chatting will live within the web site, and be platform independent (Java or Flash come to mind, but the vendor's expertise is important here). Custom *Goto Meeting* integration may be a viable alternative as well.

### **Maintenance and Scalability**

The vendor will propose a monthly maintenance plan that addresses ongoing security updates, data backup and integrity, emergency response, and link-checking as well as trouble shooting and support as issues arise. Minimally the vendor should provide support during regular business hours Monday thru Friday PST.

The vendor will also anticipate hardware needs and costs as the system grows as well as propose solutions for scalability. Currently the system runs well on a single dedicated RAID server, however as the user generated content grows, the system will need to scale as well as have acceptable real world performance in usage (i.e. the user should not have long lag times using the site in any area).

### **Documentation, Help Systems**

All tools accessed by the end user and all administrative areas should have robust "Help" and documentation. Many firms leave this as an afterthought. Please ensure that all development is completely documented and help provided for end users in an intuitive way.

# Project Requirements

The following requirements are expected in the execution of these projects:

## **Full Testing of all Development**

The vendor should have an established testing methodology in-house for all development. All testing needs to be verifiable by MLC and documented by the vendor.

## **Communication Plan**

The vendor will provide a descriptive Communication Plan that minimally outlines:

- Project status reports, frequency, when to expect deliverables
- Meeting schedules and requirements
- “Facetime” meetings, meaning live human interaction
- Budget updates
- Conflict resolution
- Point person or account manager

## **Support Procedures**

Please describe how your firm will handle new knowledge and support issues as they arise - both known and unforeseen.

## **Internet Explorer 6.0**

The current tools function on Internet Explorer 6.0. As baffling and frustrating as that is, many of the health systems are still locked in to Windows XP SP2 and Internet Explorer 6.0. Please adjust your budgets as necessary to allow for tools to be made to minimally work for Internet Explorer 6.0. We do not expect 100% compatibility, but IE 6 should still function for most of the web site.

## **No Proprietary Software**

Due to the risk of being “held hostage” should a vendor cease business operations, we will not allow any proprietary software development that is tied to a vendor’s business. All source code must be made available to MLC at all times as per the licensing agreement.

## **Licensing Agreements:**

Please articulate clear licensing and usage terms in your proposal.

**Code Commenting**

All code should be carefully commented and all functions documented. ***This is a non-negotiable requirement.***

**Timelines**

These projects will be expected to be completed in phases with all deliverables expected within the next 1.5 to 8 months. *To be clear, this does not mean the vendor has 8 months to deliver all the work at once at the end of the 8th month.* This means the first phase that is agreed to will be delivered within 1.5 months with a logical implementation of each additional phase within 8 months. The vendor is expected to negotiate realistic and clearly phased timelines for deliverables.

# Vendor Requirements

It is crucial that we select the right vendor moving forward over the next year. Please read carefully the following requirements. ***If you do not meet all of the criteria, we respectfully ask that you do not bid on this project.***

- Vendor is expected to be a “partner” with us, to help shape and achieve our interactive technology goals.
- Vendor must demonstrate consistent and clear project management abilities to deliver projects within scope, budget and on time.
- Vendor must reasonably assess project deliverables and provide realistic deadlines.
- Vendor must have the ability to react quickly to projects/development and must have enough resources/staff available to move immediately upon project requests.
- Vendor must have been in business under the same name for at least 3 years and is a growing concern.
- Must have 2 million dollars of General Liability Business Insurance.
- Must be properly licensed on a local and state level.
- Must not be a “broker” or staffing agency. We want a firm that works together continually with salaried staff.
- Must be able to meet in person when necessary.
- Applicants will be required to furnish current references.
- All source code must be freely available to MLC and clearly licensed.
- All source code must be carefully commented.
- **ABSOLUTELY NO OFFSHORE COMPANIES.**

# Vendor Expectations

## Proposal evaluation is on the following criteria:

- Project understanding.
- Project cost.
- MLC's expectation is that vendors will present a cost-effective solution for the projects described herein. Tiered/itemized pricing schemes will help in the evaluation.
- Vendor team experience.
- Personnel strength & personality.
- Differential advantage (why we should choose you over someone else).

## Sample Project Plan

Please provide a sample project plan with clear assumptions, based on your understanding of the information from this document. *We realize this will not always be precise as there will be a discovery period once project begins, but we should gain a basic idea of your approach to the projects.*

## Budget

Please provide an itemized budget with breakdowns for all proposed project phases to the best of your ability with the information available.

Create the budget based on the ideal methodology and process to meet our project needs. Budget negotiations will be based on your initial proposal of how MLC can most effectively produce the outcomes outlined above.

## Selection Timeline

***Proposals must be presented to MLC by 5:00 p.m. (PT) on November 29, 2010.***

Proposals may be mailed to Ministry Leadership Center c/o Grip Media, 4605 NE Portland #204a, Portland, OR 97213 or e-mailed to [mlcproposal@gripmedia.net](mailto:mlcproposal@gripmedia.net). No late proposals will be accepted. Please no phone calls after November 24th regarding the proposal. Emails will be answered through Nov. 28, 2010. Please direct questions to [mlcproposal@gripmedia.net](mailto:mlcproposal@gripmedia.net).

## Contact and Questions

If you have any questions regarding the RFP, you may schedule a time to speak with Jerry Chrisman, Owner, Grip Media, between November 17 and November 24, 2010. To schedule a call, please contact Mr. Chrisman at 503-467-4090. Limited access to the current web tool for proposal purposes can be granted by contacting Mr. Chrisman as well.

**Key Dates:**

- RFP available to vendors November 15, 2010
- Opportunity for vendor questions between of November 17-24, 2010
- **RFP due November 29, 2010, 5pm.**
- Bid answers and/or vendor selection Dec. 15, 2010.

**Assumptions and Agreements**

All costs associated with the preparation and presentation of the proposal will be borne by the participating vendors. Proposals and any accompanying documentation will not be returned.

Proposals will be considered final as submitted and may not be altered unless requested by the MLC.

# Proposal Instructions & Check List

Below are just a few guidelines for your RFP response. Feel free to include any information that you feel is critical to the comprehensiveness of your response, even if it is not expressly asked for within the RFP.

**As part of your proposal, please address the following:**

- ☐ Sample project plan.
- ☐ Communication plan.
- ☐ Project budgets.
- ☐ Your approach to web site and technology design described.
- ☐ Details regarding your web site project management process.
- ☐ A summary of web site development experience.
- ☐ Summary of iPhone, iPad and Android development experience.
- ☐ List at least 3 client references (references must be current, and include the name of each organization, point of contact and telephone number).
- ☐ Identify who will be involved in your project including their relevant experience and credentials.
- ☐ Brief history of company, including summary of past and current clients.

## General Criteria

Proposals should include a response to all aspects of the evaluation criteria.

Please be sure to include the name and any pertinent contact information for clarification during the review process. Proposals should include a summary of your approach to the work, any exceptions to be taken, and any alternative or additional information that you deem important to the representation of your team.

*Submission of a response to this RFP does not bind MLC to engage the vendor to provide the requested service. MLC may cancel this RFP, in whole or part. MLC reserves the right to reject any and all proposals, accept any proposal terms it deems to*

*be in the best interest of the organization, waives any informalities in proposals submitted, and waives any minor irregularities or discrepancies in proposal procedures. MLC reserves the right to use more than one vendor for different projects if it deems this approach the most beneficial for MLC, though it is MLC's desire to use primarily one vendor.*

**Statement of Confidentiality**

As a selected vendor, your organization will guarantee that all discussions, materials, and findings will be held in confidence. This RFP and the nature of work solicited is the confidential and proprietary information of MLC and the information contained herein may only be used as necessary to prepare a proposal for submission to MLC.