

Request for Proposals

Web Site Design and Development, CMS, CRM, Related System Integrations

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Summary of Soliciting Company and Project

Particep, LLC a real estate industry company engaged in real estate investment, development and advisory services is accepting proposals to design and develop a Web site for a subsidiary company offering real estate industry developers and investors access to deal notification services, pertinent industry news, data, and original content, as well as online "industry peer" networking opportunities through a customized "social online community" architecture.

Proposal Guidelines and Requirements

- 1) Proposals must be received by 12:00pm/noon EST, Monday, October 12, 2009 (contact information provided in final paragraph of this request document)
- 2) The proposal must contain the signature of a duly authorized officer or agent of the company submitting the proposal.
- 3) **If you wish to submit alternate solutions** and corresponding site features and applications not mentioned herein, **please do so** along with an explanation for the suggested implementation and its impact on cost.
- 4) The price you quote should be inclusive of all requested project components, required licenses for implementation, and services detailed in this document.
- 5) 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.
- 6) The entirety of a response will be deemed to be included in the final proposed cost, and if accepted without further negotiation as to cost, will be incorporated in as such to the final service agreement.

Web Site Goals and Monetization Objectives

Particep, LLC is financing the development of a Web site whose primary revenue streams will be:

- A subscription service for notifications related to real estate industry joint venture opportunities.
- An "online community" architecture available to both subscribers to the notification service as well as being an open online community free for interested users; subscribers, however, having access to advanced account /community features and page views for the management of their subscription services.
- Targeted advertising through both the email notification system as well as placements on the web site and within sections of the online community page views.

Audience

Private sector real estate industry developers and investors across property types operating on local, regional and national levels.

Real estate industry related business sectors / services providers as members of online community and advertisers.

Advertisers seeking to reach real estate industry companies through a very targeted means of distributing advertising content.

Scope of Services

1) Design engaging Web site built on a community architecture utilizing:

- Joomla as the Content Management System
- Implement the Joomla Community Builder extension to facilitate community registration, profiles, and connection paths. Online community / profiles should, at a minimum (and additional suggestions shall be considered):
 - Different profile levels / view for subscribers and non-paying community members.
 - For paying subscribers, account information view, ability to query database deals when logged into profile, the ability to save deals of interest to profile,
 - The ability to request submission as content provider and submit content as an approved content provider.
- Web pages designed for the content / data component of the Web site which will include articles by industry experts, best practice and case studies, as well as access to real estate market data.
- Required customization of web forms for community and subscriber registration and the submission of deals and related documents for distribution to subscriber base through email notifications as well as web site queries.
- Required customization of web forms related to sales of related company and partner services, advertising space, newsletters and events that are built for the Web site / company CRM (see Part 2 of this Section).
- Logo design
- Design of custom html email for email subscription service that corresponds to the design characteristics of the Web site. Customized html email template must (a) auto-populate deals generated from deal database (b) provide for automatic distribution to subscribers / recipients using CRM mass-email functionalities.
- Design of Web page and equivalent PDF for download and distribution for the Web site's media kit-- primary advertising sales document-- which corresponds to the design characteristics of the Web site
- Implement RSS Feeds for (a) news and blog entries open to any feed subscribers (b) a RSS Feed for subscribers as an additional means of distributing deal information from database, requiring username and password login (corresponding to community builder username/password)

2) Implementation of a customized CRM (customer relationship management) system facilitating:

- Contact management for subscribers receiving email alerts for deals matching their specified criteria as well as contact management for the larger registered community user base.
- A campaign management system handling automated email blasts (including html email noted in Section 1) to subscribers as well as functioning as a marketing campaign management tool.
- Standard lead and opportunity objects and object views corresponding to Web site community users and subscribers
- Standard implementations of workflows and triggers related to (a) email auto-response to CRM-managed form submissions (b) lead alerts (c) up to 20 assigned workflow/triggers for user alerts/assignments.
- *Notes on CRM: proposer may make suggestions for fully customized CRM built on the online community architecture or otherwise; proposer also has at its disposal the application of the company's currently utilized CRMs: Sugar Professional or Salesforce Enterprise.
 - o Note on Sugar Professional: If proposal includes the utilization of Sugar CRM, it will be expected that the Sugary CB extension will be used for fluid management of community builder profiles and subscribers, and vendor will be responsible for implementing this required extension.
 - o Note on Salesforce.com: If proposal includes the utilization of Salesforce.com, vendor must provide details on the manner in which the community builder database will be accessed and the manner in which the CRM's corresponding objects, including community users / subscribers/ contacts, will remain fluidly updated.
 - o Note on Custom CRM: if proposal details the use of a custom built CRM, or suggests the integration of a CRM by a third-party vendor not mentioned in this Request, please provide details on the costs entailed with a full customization or the alternative suggestion.

3) Customization and/or suggestions for, and required setup of, system for handling advertising inventory, placements and ad period timing, as well as company/advertiser contact information

- System must have similar level of functionality for inventory, placement and contact management as found in Google AdManager (example, not requisite component).
- The integration of the Web site's advertisements management system would preferably be either integrated into the aforementioned CRM or enable CRM users to view inventory, available space for sales, and advertiser contacts from within the CRM.
- Corresponding setup of spaces/areas on Web site pages, as deemed best practice, for placement of advertising inventory.

4) Integration of payments and billing system for Web site services / subscriptions and advertising payment invoicing

- Online shopping cart with subscription handling capability.
- Implementation of, or suggestions for, the integration of accounting system for creation of financial reports, revenue and income projections, and invoicing of any services not purchased on the Web site shopping cart.
- *To the extent feasible in light of current usable applications and cost constraints of customizations, integration of accounting system into CRM.

5) Optimization of Web site for organic search

- To include keywords, tagging, submission of site pages using Google Webmaster tools and similar submissions using tools provided by other major search companies.
- Proposer may, at proposer's discretion as a part of this proposal, include ongoing SEO services to include creation of Web site presence on social / business networks; though if presented as part of proposed services, cost of this proposal element must be clearly stated as included in final cost. *Proposer may also simply indicate, as a notation to the document, whether or not such SEO services are offered and at what monthly cost.

6) Design process and client approval process

- Proposer must work closely with client on determining the style/look/feel of Web pages and provide at a minimum three alternative design options or stages of design alterations as may be needed.
- Proposer, in signing submitted proposal, represents and warrants that the Web site will be a custom designed site and that a design template will not be used.
- Proposer must test all functions of the web site, including, but not limited to, those of the online community, web forms, ad management system, CRM, and other integrations described herein, demonstrating that all components function as requested and committed to prior to official launch of the Web site.

7) Code for Web Site Analysis

- Proposer is expected to be knowledgeable and experienced incorporating code for Web site analytics, including at a minimum Google Analytics ga.js with a capabilities for installing Analytics code for tracking of events, ecommerce, as well as cross domain traffic and visitor configuration.
- Selected company / individual will also be responsible for installing code for up to four additional tracking / analysis services as may be requested.

8) Timeline, Deliverables and Corresponding Cost

- Proposal must include a list of all deliverables representing in their totality the requests made herein-- or the submitter's alternative suggestions;
- A timeline for completion of each deliverable or set of deliverables; and,
- Must include the related cost of each deliverable / project component described in the deliverables/timeline.
- The business or individual selected will be required in the service agreement (the requirements set forth in this solicitation to be incorporated therein) to agree to the timely completion of deliverables in accordance with the submitted timeline.
- Unless untimely completion of a deliverable (and definitively corresponding subsequent delays) has been caused by an additional request made by the soliciting

party outside of the original scope, or by a request for an alternative expected completion date by the soliciting party, the stated cost of the deliverable will be reduced by 10% (ten percent) for each period constituting two weeks or ten business days past the stated duration of time for completion of the deliverable.

9) Training

- Selected proposer will be required to provide needed training for use of the CMS, CRM, and other system integrations mentioned herein; providing at a maximum and as deemed needed by client, four training sessions, each session not exceeding two hours in length.

10) Site Launch

- Selected proposer will be responsible for uploading and completing final testing of the Web site on the Web site host.

11) References & Company Description / Capabilities

- Please provide a list of five references, including: contact name, contact role in site decision making processes, company, phone, email, and web site.
- Proposal should include a list of at least five web sites the firm has produced that best reflect your work and relevancy to this project.
- Describe the role your firm played in each project and the similarity of the example site's architecture and components. Please state if an example site is related to a reference. If so, please include URL for the purpose of our evaluating how site design may contribute to the site's loading speed, an important goal for our implementation. If example Web site is not owned by a listed reference the owner of the Web site will not be contacted.
- Briefly describe your firm's organizational capacity to produce the Web site and related / integrated systems (e.g. staff, equipment, software, physical space, office/staff 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.

- Explain how your company's current and anticipated workload will not interfere with the optimal allocation of staff and staff time and resources for the implementation of this project.

12) Rights in Work Product and Licenses

- Vendor will provide all necessary software and licenses to maintain site-- the cost of any required license purchases are to be included in the final proposed cost.
- All licenses are to be assigned to client.
- Client shall retain all rights in Web site design, design elements, logo, customized site architecture plans, custom applications created for the components described herein as well as requisite programming developed for the incorporation of third-party services.

13) Proposal Evaluation

Proposals will be evaluated in light of demonstrated expertise in recommending and communicating appropriate technical and aesthetic solutions as well as evidenced by the proposal and references.

- **Aesthetic Capabilities:** Prior work demonstrates artistic and innovative, user friendly interfaces that engage viewers, retain users, and heighten the propensity of site visitors to purchase services/products.
- **Experience:** Candidate has successfully completed similar projects and has the qualifications necessary to undertake this project.
- **Price Levels:** The price is commensurate with the value offered by the proposer.

14) Confidentiality and Non-Compete

- **Confidentiality:** Upon selection, servicing firm will be required to sign a confidentiality agreement covering all aspects of information including, but not limited to, the business plan / model for which the Web site is being implemented, target users/audience, target advertisers, and all details not readily discernible to the average person/site visitor viewing or using the Web site's services, of the system purposes and capabilities. Vendor will be responsible for any and all damages incurred due to any breach of the terms of the confidentiality agreement.

- Non-Compete: Upon selection, the firm will be provided with greater detail as to the intended site users, target audience and advertisers, and thereafter shall make a disclosure as to any current or prospective clients that are or will be direct competitors to any of the Web site's / business' objectives. The selected firm may provide either the competing company's name or a description of the potential conflict of interest. This will not necessarily exclude selected firm from entering into the final contract for services to be rendered in light of the confidentiality agreement.

15) Submission Format & Contact Information

Please submit your proposal in either Word or PDF format by email to:

Ms. Tirada Wongdao, Office Director

Email: tirada.wongdao@particep.com

Submit by: 12:00pm/noon EST, Monday, October 12, 2009

Please submit questions by email to Ms. Wongdao who will schedule phone calls for any questions we feel cannot be optimally addressed by an email response.