



Xceed Financial Credit Union

Request for Proposal: Website Redesign for www.xfcu.org

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General Statement

Xceed Financial Federal Credit Union (XFCU) is issuing this “Request for Proposal” (RFP) for the sole purpose of obtaining information about the **Xceed Online Website Redesign** (“Project”).

Please submit all proposal items in electronic form, including brochures, text material supporting the requirements in this RFP, and pricing information.

All questions are to be directed to the Project Manager and address listed below:

Marquis Boochee

Vice President, eStrategy & Innovation

888 N. Nash Street

El Segundo, CA 90245

310.607.2044

In no case is any respondent, representative, agent, contractor or sub-contractor to visit any site listed in this RFP, or contact any XFCU employee, agent or vendor, without written permission from the Project Manager.

Additional statements are as follows:

1. XFCU desires to obtain Proposals from qualified vendors (“Bidder”) to complete the Project.
2. All information contained in this RFP and any attachments or drawings are confidential and must not be disclosed by the recipient of this RFP to any third parties except as required in order to obtain information necessary to respond to this RFP. Bidder must obtain written consent from XFCU in advance of any disclosure hereunder.
3. The building described in this RFP is located at 888 N. Nash Street, El Segundo, CA 90245.
4. Any costs associated with responding to this RFP or preparing proposals are the sole responsibility of the Bidder.
5. To qualify as a Bidder, a mandatory demonstration of your proposed product solution will take place at Xceed Headquarters (888 N. Nash Street, El Segundo, CA 90245) around **May 11, 2012**. Interested parties should contact XFCU’s Project Manager no later than **May 4** to confirm interest and schedule a demonstration.
6. Before submitting a proposal, Bidders should carefully examine this RFP, its attachments and related documentation, and fully inform themselves as to all existing conditions and requirements.
7. Upon acceptance of a proposal by XFCU, no consideration will be granted to Bidder for any alleged misunderstanding of the material, article, or piece of equipment to be furnished or work to be done. It is understood by Bidder that the tender of a proposal carries with it the agreement to all items and conditions referred to or indicated in this RFP, its attachments or related documents.
8. Bidder must submit as part of the proposal a complete Work Schedule, indicating milestones and dates, including a proposed completion date, based on the scope of work. As part of the Work Schedule, or on a separate sheet, Bidder must submit a Schedule of Values, allocating costs for the various parts of all work to be performed.

9. Notwithstanding anything to the contrary herein, there shall be no binding contract to perform any work described under the proposal until both parties have executed the applicable Agreement.
10. Please submit all proposal materials online, made available to XFCU no later than **Friday, May 4, 2012** at 3:00PM PST addressed to the Project Manager. Proposals will not be accepted after this deadline.
11. XFCU reserves the right to reject any and all proposals or to cancel this RFP at any time prior to execution of the Service Agreement. XFCU also reserves the right to waive all informalities or irregularities found in the Bidder's proposal.
12. Not included in this RFP is a "Schedule of Payments" commonly called progress payments. This will be negotiated with the selected vendor at a later date.

Project Information

Appendix A contains specific details related to the Project. Use the information in the Appendix as your basis for pricing. You are encouraged to contact the Project Manager for an informal discussion about this RFP.

Vendor Requirements

Bidders agree that any proposals submitted to XFCU will be based on the following standards and requirements. Please respond by item (i.e., 1. – Your Response) where appropriate. For requested documents, please include them as attachments.

1. Provide your company name, address, website, telephone number, email and appropriate contacts.
2. Indicate the year the company was established.
3. Give the number of years the company has been involved with the proposed Project-related solution.
4. Give a brief statement as to your philosophy, product lines and scope of services.
5. Give the locations of national, regional and local offices. Designate which office would serve us.
6. Provide an organizational chart showing the number of personnel by function or department, as applicable to the Project.
7. Indicate the number of companies using the proposed solution.
8. List four (4) current clients as references (preferably credit unions or other financial institutions) whom may be contacted, which include a contact name, email and telephone number for each reference. Listed references should be companies similar in our size and functional needs. List also two (2) former clients that have discontinued service in the past two years.
9. List the names of all new customers in the last twelve months who began using the proposed solution. Give the date each customer accepted your offering and dates conversion both began and was completed.
10. Describe in detail your philosophical approach to research and development (R&D); resources committed to R&D (actual for past three years and projected for next three years), how R&D is funded, and major R&D efforts currently underway.
11. Provide a detailed description of your efforts associated with the planning, testing and funding of disaster recovery plans.

12. Provide a breakdown of the number of employees at your company in the following format:
 - Total Company
 - Servicing related only
 - Customer support department
 - Installation/conversion department
 - Research and development department
 - Software maintenance/software development department
13. Provide last three (3) years audited financials.
14. Advise us of any limitations that would affect delivery.
15. Provide a copy of the last two (2) years independent audit reports. Also provide your comment on any recommendations made by the auditor(s).
16. Describe what you believe are your most innovative improvements implemented within the last 12 months.
17. Describe any future enhancements now in process and their scheduled implementation date(s).
18. Provide a copy of any third party review or write-up of your solution of which you are aware, which have been published in the last 18 months.
19. If you use any third parties to provide services related to the Project, provide the names of such third parties and reports related to their performance.
20. List licenses and certifications are you required to have in order to be in business and to perform services applicable to the Project. Provide confirmation that you currently have them and their expiration dates.
21. Provide a description and disposition of any and all litigations against your company.

Scope of Work: Redesign and Develop Xceed Online Website

The project for bid involves designing and coding an updated version of Xceed Financial's website. In 2011, Xceed upgraded its online banking system, which enables members to conduct most credit union business from their desktop or mobile device.

This Request for Proposal is for the public-facing website ONLY(www.xfcu.org)—and NOT the online banking portion of our website. The website must, however, contain log-in fields throughout, so that users can enter the online banking section at any point in the online experience.

Scope of work includes:

- Develop navigational hierarchy and flow chart
- Create wireframes of unique pages
- Recommend CMS (Content Management System) solution for blog and template portions of the site
- Design on a 1024x768 screen resolution and 900 width for content area
- Have awareness of federal credit union and/or financial institutions
- Ability to incorporate dropdowns or mega-menus
- Use javascript vs flash for iOS platforms
- Create a clean, sleek, and professional design style that reflects Xceed's unique culture

- Design, code and deliver website ready for use
- Provide coding assistance as needed
- Ability to integrate some of the existing programming features on our current website, which would include rate update and the various customized forms
- Create form template solutions that are highly customizable
- Allow administrators to upload csv files such as a rate sheets that will automatically update rates based on the csv
- Establish an ASP solution that connects to third party websites
- Clearly explain which coding language will be used (ie: HTML, PHP, ASP.net)
- Provide the source code upon completion
- Optimize the website for mobile use
- Install social media “ShareThis” scripts to allow viewers to “share” pages on social media sites
- Create ability for production of customized microsites for Xceed member groups that link seamlessly to Xceed Online.

The above score of work should not be considered comprehensive. If your proposed solution has other features, please include them in your supporting text.

Indicate in your text material of the RFP the service level response times for major and minor service events and define major and minor service events. When you list your features, indicate if they are standard or optional and if there are any additional costs. Provide detailed information regarding the system requirements for software and hardware.

Contract

Include a copy of your agreement/contract to the material you submit. XFCU will treat this contract as informational only, with the actual contract to be negotiated at a later time, as applicable.

Pricing Structure

Pricing should be based on the information contained in **Attachment A** of this RFP.

System Training

System training must be provided for a minimum of **five** XFCU team members.

Implementation Timetable and Work Program

April 12	Request for Proposal
May 4	Proposal Due
May 11	Presentations scheduled
May 22	Presentations begin
June 15	Project awarded

Please respond by item (i.e., 1. – “insert your response”).

1. Will a project manager be assigned by you to coordinate the implementation of the Project?
2. What other resources will be assigned to support such implementation?
3. Indicate the total number of days to implement the Project.

Ongoing Maintenance and Support

Please respond by item (i.e., 1. – “insert your response”).

1. How are questions and requests for changes and technical assistance handled? What is the expected turn around time?
2. Describe your customer support organization - its structure, their experience, and the number of years with your company.
3. How are enhancement projects prioritized?
4. What is the pricing basis for enhancements or other special requests?
5. How are outstanding problems and enhancement requests tracked?
6. What hours are customer support personnel available? Is 7-day/24-hour support available? If not, when is it available?
7. What type of support and training is provided for updates or new releases?
8. Describe how often software associated with this proposal is updated.
9. Describe security provisions that exist to prevent unauthorized file changes and unauthorized access to data both from your site and our site.
10. Describe the approach to be used in providing data backup.
11. If selected as a "finalist", describe the conditions under which you are willing to provide a complete set of audit documentation for review.

Business Continuity/Disaster Recovery

Please respond by item (i.e., 1. – “insert your response”).

1. Does your company have documented plans for business continuity (BCP) and IT disaster recovery (DRP)?
2. What type of failure scenarios or outages does your company plan for?
3. Does the BCP/DRP establish critical business functions with recovery priorities?
4. What is the expected recovery time for your company's critical business functions?
5. Does your company's BCP/DRP account for interdependencies both internal and external to your company?
6. Does the BCP/DRP cover all locations from which your company provides services to the Credit Union?
7. Does your company have a dedicated team of professionals focused on business continuity and/or IT disaster recovery?
8. Does your company's BCP/DRP cover internal and external communications during a crisis event?
9. How does your company notify your team and customers (such as the Credit Union) of an incident and direct them through the recovery?

10. Does your company have an alternate site location for data center and work area recovery purposes?
11. What is the approx. distance between your production (primary) site and alternate (secondary) site for data center recovery purposes?
12. Does your company use an external BCP/DRP service provider for your data center and work area recovery needs? If “yes”, is your contract with your BCP/DRP service provider honored on a first-come/first-served basis?
13. What recovery strategy does your company use for mainframe and for distributed systems?
14. Are your company’s recovery systems compatible to the Credit Union’s systems?
15. Is the processing capacity ratio of your company’s back-up facility equal to that of your primary facility?
16. Is it feasible to run from your company’s back-up facility for an extended period (i.e., at least six weeks)?
17. How frequently is your company’s BCP and DRP tested? Please provide the last two dates of testing?
18. What components of your systems and infrastructure are tested?
19. Does your company involve IT staff, business unit or operations staff or both in your internal BCP/DR tests?
20. Does your internal or external auditor review your BCP/DR tests? What were the last result of such review?
21. If selected as a "finalist", describe the conditions under which you are willing to provide a complete set of audit documentation for review.
22. Indicate whether cost for providing disaster recovery backup is included in the proposed cost. If not, indicate how much it will cost?

BUDGET

Please provide budget and annualized pricing detail in the following format:

Description	One-time Costs	Annual Recurring Costs

Submission Requirements

It is the responsibility of the Bidder to make certain that its Proposal is complete in accordance with the terms of the RFP.

- All materials are to be submitted at once in an orderly manner.
- All materials must be submitted in electronic format.
- Include pdf files of forms, agreements and warranties.

ATTACHMENT A

Xceed Financial Credit Union has initiated a Request for Proposal (RFP) process to identify a vendor qualified to plan, execute and deliver the redesign of Xceed's website www.xfcu.org. In 2011, Xceed upgraded its online banking system, which enables members to conduct most credit union business from their desktop or mobile device.

This Request for Proposal is for the public-facing website ONLY (www.xfcu.org)—and NOT the online banking portion of our website. The website must, however, contain log-in fields throughout, so that users can enter the online banking section at any point in the online experience.

We require a vendor that has demonstrated experience in managing website projects and expertise with best practices regarding successful website design, development, and deployment.

About Xceed

Headquartered in El Segundo, Calif., Xceed Financial Credit Union is a federally chartered workplace credit union that focuses on meeting the needs of businesses and their employees throughout the United States. The credit union started in 1964 as Scientific Data Systems Credit Union and later became Xerox Federal Credit Union in 1970. A new name and brand identity were launched in 2008 to reflect the credit union's expanded field of membership and new business model. Xceed delivers personal banking and financial literacy directly to "select employer groups" (SEGs) and is proud to help more than 59,000 members realize their dreams. Xceed Financial has more than \$750 million in assets and 14 Financial Centers in six states.

We are currently in the process of developing our 2011 Annual report. Until that is complete, please see our 2010 Annual Report:

http://www.xfcu.org/downloads/052611_Xceed_Annual_2010.pdf

Project Background

While the current website serves our members well, Xceed now requires a redesigned site that offers an outstanding, intuitive and elegant user experience—one that reflects our unique culture and the service we offer our members.

With our services increasingly moving online—and the fact that many members will NEVER visit an Xceed Financial Center in person—Xceed Online represents the credit union itself. It is crucial, therefore, that the site delivers our philosophy

Current Usage / Website Statistics

There is an average monthly volume of 9,476 total visits, 6,157 unique visitors, 14,985 page views, 1.58 page views/visit, a bounce rate of 71.86%. The bounce rate MUST be reduced with the newly created website.

Project Goals

The goal of this project is to create a website that reflects our brand image as well as our member service philosophy:

- Putting our members first
- Championing our members' hopes, dreams and goals
- Great loan rates
- A wider choice of products and services
- Personal member service
- Expert financial advice
- Convenient financial centers

Specifically, the Xceed website redesign must:

- Offer easy, intuitive content access
- Elegant, appealing look and feel that reflects our philosophy as well as the clean, “designed” look of our Financial Centers
- Provide easy-to-use, efficient search engine
- Integrate with social media
- Deliver higher member satisfaction

Target Audiences

The target audiences for the site and their primary usage of the content are as follows:

- HR representatives from potential SEGs seeking member benefits, background information on Xceed
- New SEG associates (potential members) seeking information
- New SEG associates seeking online membership enrollment
- Members seeking information on types of accounts, loans, credit cards, savings
- Members seeking investment information
- Policymakers, press, students

Servers / Hosting

Vendor must suggest secure, private server hosting options, either internally or with a reliable third party vendor.

Style

Style is very important to us at Xceed, and we think it is important to our members, too. Please see our Style Guide / Corporate Color Palette: <http://www.xfcu.org/styleguide/> and Brand Evolution document (See **Attachment B**).

Also, please feel free to visit our flagship Financial Center at 837 N. Douglas Street, El Segundo, 90245 (or another Xceed Financial Center; find locations [here](#)), to experience the physical environment of Xceed.

Copy

Vendor will be responsible for some copy development. Some copy can be lifted from existing site; some will be created new by Xceed.

ADA Compliance

The website should be compliant with the requirements of the Americans with Disabilities Act.

Timeframe

April 12	Request for Proposal
May 4	Proposal Due
May 11	Presentations scheduled
May 22	Presentations begin
June 15	Project awarded

Proposal Instructions

Please submit all proposal materials online, made available to XFCU no later than **Friday, May 4, 2012** at 3:00PM PST addressed to the Project Manager. Proposals will not be accepted after this deadline.

As part of your proposal, please address the following:

- Sample Project Plan
- Proposed development timeframe
- Project Budget
- Your approach to website design
- Details regarding your website project management process
- A summary of website development experience
- A listing of existing client references
- Identify who will be involved on your project team, including their relevant experience and credentials

Please be sure to include the name and contact details of persons to be approached for clarification of the proposal if needed.

Additional Information or Clarification

Contact: Marquis Boochee, 310.607.2044 mboochee@xfcu.org.

Attachment B: Brand Evolution pdf