

REQUEST FOR PROPOSAL

April 7, 2011

Hosfeld & Associates Inc. requests competitive proposals on behalf of Plymouth (Congregational) Church, located in Seattle, Washington. Proposals may include all design and development, or may be joint proposals submitted by partnering design and development firms.

Proposals should include:

- Background information on your company and its experience working with organizations to redesign comprehensive Web sites
- Bios of team members and relevant experience
- Samples of similar work completed for other clients, ideally in the church or non-profit arena
- A detailed cost breakdown for the project deliverables
- A timeline for completion of project deliverables
- Client references, preferably from non-profit organizations
- Demos of CMS systems you have created that are intuitive and appropriate for the non-technical user (can be screen shots or time-limited access to an online example)

Proposals will be evaluated on:

- Demonstrated comprehension of desired outcomes
- Experience of team assigned to this project
- Experience in successfully completing similar projects for nonprofit organizations
- Cost-effectiveness and timely implementation

Please send proposals to Kathleen Hosfeld, by April 29, 2011.

Kathleen Hosfeld
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4420 SW Lander Street
Seattle, WA 98116

hosfeld@hosfeldconsulting.com
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800-277-8389
206-938-3070

About Plymouth

Plymouth Church, a member of the United Church of Christ, is a progressive Christian faith community located in the heart of downtown Seattle. Plymouth has a long history of spiritual leadership in Seattle, and is responsible for the creation of numerous housing-related ministries such as Plymouth Housing Group, now an independent non-profit low-income housing organization, and Plymouth Healing Communities, a housing and companionship ministry for persons with mental illness. With approximately 700 members, the church has numerous active spiritual and social-justice ministries and programs, as well as music events. The church seeks a Website that can provide a vital communication link to those who participate in or benefit from these diverse ministries and programs.

Branding

Hosfeld & Associates recently completed a communications assessment for Plymouth and one of our chief findings is that the church has no intentional brand identity. Its graphic identity, which was developed by a church member, is colorful and distinctive, but it does not communicate a particular personality or set of values of the church. The church has undergone a period of transition concerning its identity and values, which is in some ways very specific to Plymouth and in other ways reflects the cultural transition affecting progressive Christianity as a whole.

While the discovery phase of this project is underway, Hosfeld & Associates will be conducting brand information gathering work with the congregation and its leaders. This information will be provided to the vendor before the design process begins.

Plymouth would like to retain its logotype and symbol. The symbol is an architectural feature of the sanctuary and represents a dove, a symbol both of peace and the presence of the Spirit of God.



There is a style guide for use of the typography and symbol which will be provided to the successful vendor.

Integration with Church Database

The scope of work will include assistance to determine how best to integrate the church database with the website.

Like many churches, Plymouth uses a software product to track member information, pledge giving, and member activity. The product currently in use is called Church Management Software (CMS), which is housed on a server at the church office and does not have connectivity to the Internet. To distinguish this CMS product from the one requested in this RFP to manage web content/assets will refer to the current membership software database as CMS-Org, referring to the organizational nature of the system rather than Web content management.

The church database allows staff to perform the following functions (representative):

- Track individuals as individuals as well as members of families¹
- Track the activity of individuals in terms of their membership in classes and participation in specific events
- Track pledges and actual giving
- Flag individuals for pastoral care intervention and follow-up
- Create lists of individuals based on age, involvement in classes, and other variables.
- Export lists for use in mail-merge programs
- (Screen shots from this database are available upon request)
- Print out a contact directory of all members and their information that can be published in quantity as the church “directory.”

CMS-Org was developed by Church Management Solutions

<http://www.churchmanagementsolutions.com/>, which was recently acquired by ParishSoft.

ParishSoft offers similar technology solutions for Catholic, Episcopal and Orthodox churches; these churches themselves are hierarchically oriented and this influences how the systems operate. Church Management Solutions produces technology solutions for non-denominational and Protestant organizations, which have a less hierarchical structure. More volunteers run projects and interface with the membership database than in hierarchical churches where everything runs through staff and clergy.

ParishSoft has announced its intention to migrate its products onto the Internet meaning that a transition from a dedicated in-house server is in Plymouth’s future. It is unclear, however, if ParishSoft will allow the customized interaction with Plymouth’s website or will require proprietary interfaces.

¹ One feature that almost no church CRM handles well is the issue of same-sex households. Almost all systems assume the Head of Household to be male. This is an important consideration in churches like Plymouth that are open and affirming of the GLBTQ community.

The Discovery phase of this assignment will include assistance to determine the details of a recommendation concerning integration of the Website with CMS-Org or a recommendation as to an alternative. Priorities for integration include:

- Ability for member to update contact information
- Ability to track online payments and giving by member
- Ability to track event/activity registration by member

Full-custom development of Plymouth's own membership management system is cost-prohibitive, when off-the-shelf programs are available for free (open source) or for annual subscriptions of as little as \$200 per year. The primary trade-off with open source solutions is support. The developer should expect to remain in relationship with the church to provide support on a paid basis.

One open-source solution for churches is <http://civicrm.org/> No commitment has been made to choosing this as an option; it is just one example of an alternate way to address the integration needs described above.

Scope

Redesign and development of the Plymouth Website per the accompanying site map. Key features of the new site design will include (but are not limited to):

- Integration with the church's membership and giving database, allowing member event registrations and payments to be recorded in the database, and allowing members to update their contact information via the website.
- A calendar of events that are coded by type such that the user can filter the type of events he or she sees (all or a selection) and displayed in either a list form or a day of the week form
- Event registration and management system, including online payment
- Robust news function that allows news items to be displayed in a list/digest form on the home page, as well as a series of interior news pages
- Both the calendar and the news sections will be associated with a print publishing capability that allows the administrator to select items and print them using a print style sheet in either hardcopy or PDF form.
 - o Additionally, we need to explore the possibility of generating the output of documents in a way that allows for mail-merge fields and compatibility with Plymouth's in-house printing capability.
- Ability to generate custom HTML of news items, including links to full news detail pages, for use in email newsletter systems such as Constant Contact, Mail Chimp and Vertical Response.
- Password protected area for document storage, organized by committee/task force (types of documents include meeting minutes, standard procedures and training documents)
- Ability to create user-generated content in the form of albums (photos and text) that allow commenting
- A ministry interest form that allows users to explore many different types of ministry teams and register their interest, with a back-end report capability (possibly integrated with church database)

Diagrams and Sample Page Specifications

In order to give vendors a sense of the project expectations this request for proposal includes sample page specifications for both front end and back end (CMS) pages. These page specifications are not detailed or complete, but are representative of expectations for both content and functionality.

It is important that any CMS solution – custom or add-in – be extremely intuitive and easy to use, improving on the usability of such systems as ChurchWebWorks and Squarespace (two CMS systems frequently used in church/fait web settings). For this reason, these page specifications show simple, hierarchically based page schemas for the CMS interface. Those submitting proposals

may suggest other approaches to CMS and these will be evaluated on the basis of 1) conformity to the objectives and requirements of the scope, 2) ease of use to non-technical users, and 3) cost-effectiveness.

Included:

Diagram: CMS – Digital and Print Outputs
Diagram – Event Information Integration with Church Database
Site Map

Front End Page Specifications:

- Text & Link Page
- Text & Link with Small Photos
- Calendar
- Featured Person/Group

Back End (CMS) Page Specifications:

- Main CMS Home
- Basic Page Data Entry
- Event List
- Event Entry
- Articles List
- Article Entry
- Newsletter List
- Newsletter HTML Generator
- Uploads

Project Phases:

The project will have four phases – Discovery, Planning, Design, Development/Build – to be followed by a Maintenance phase. Completion of each phase will direct the subsequent phase, and will be contracted separately; however proposals submitted should provide an estimate for completion of the entire scope as here described.

Phase One: Discovery

Client meeting, site analysis and other necessary research to determine priority-based needs for new Web site content, architecture and design.

Deliverable: Report outlining findings and recommendations.
The report will include:

Technical needs/capabilities of both the end- user and site administrator, to include:

- Content Management System (CMS) requirements
- Integration with Church database system
- Mobile device accessibility requirements
- Online registration and payment
- Password protected document area
- Possibility of simplified social media content integration

Recommended technical solutions (CMS, site search, other tools) based on discovery about site needs, and including information about the life cycle sustainability of the technology

Phase Two: Planning

Work with Project Manager (Hosfeld & Associates) to advise on complete page specification document, including CMS user interface design.

Deliverable: 2-3 rounds of comments on draft specification document

Phase Three: Design

Based on requirements of page specifications as well as interviews with the client, provide graphic design of templates including home page, second & third level pages, plus unique templates such as news, calendar, people, etc.

Deliverables will include:

- Three initial design directions for Plymouth Website
- Design of banners and style for print output from system
- Design of banner and style of email newsletter system
- Three rounds of revisions to drafts based on client feedback and review

- Final graphics prepared and optimized for developer use
- CD Archive of all final artwork files for client records
- Style guide

Phase Four: Development/Build

Tasks include:

- Build Plymouth Church Website
- Install/build/customize Content Management Systems and debug, ensuring CMS operates efficiently
- Build templates and transfer them to CMS
- Successfully integrate selected social media options
- Provide training and materials for the new Content Management System (train the trainer)
- Ensure Plymouth has access and necessary rights to the tools, technologies and code used for site design, delivery and management, so that all future maintenance on content and/or functionality can be conducted independently by the client, its staff, partners or vendors.

Proposal should assume that Development team will only do as much data insert into templates as is needed to test the templates/code. The client will provide the bulk of work to populate the CMS with content.

Phase: Maintenance

Post-launch maintenance, upgrades, modifications. To be contracted on an annual basis. Vendor should include fees and costs for post-launch maintenance.

Timeline and Budget

Provide a complete timeline for project by phase assuming a start date of May 15, 2011.
Provide hourly rate schedule by function.

Technical Objectives

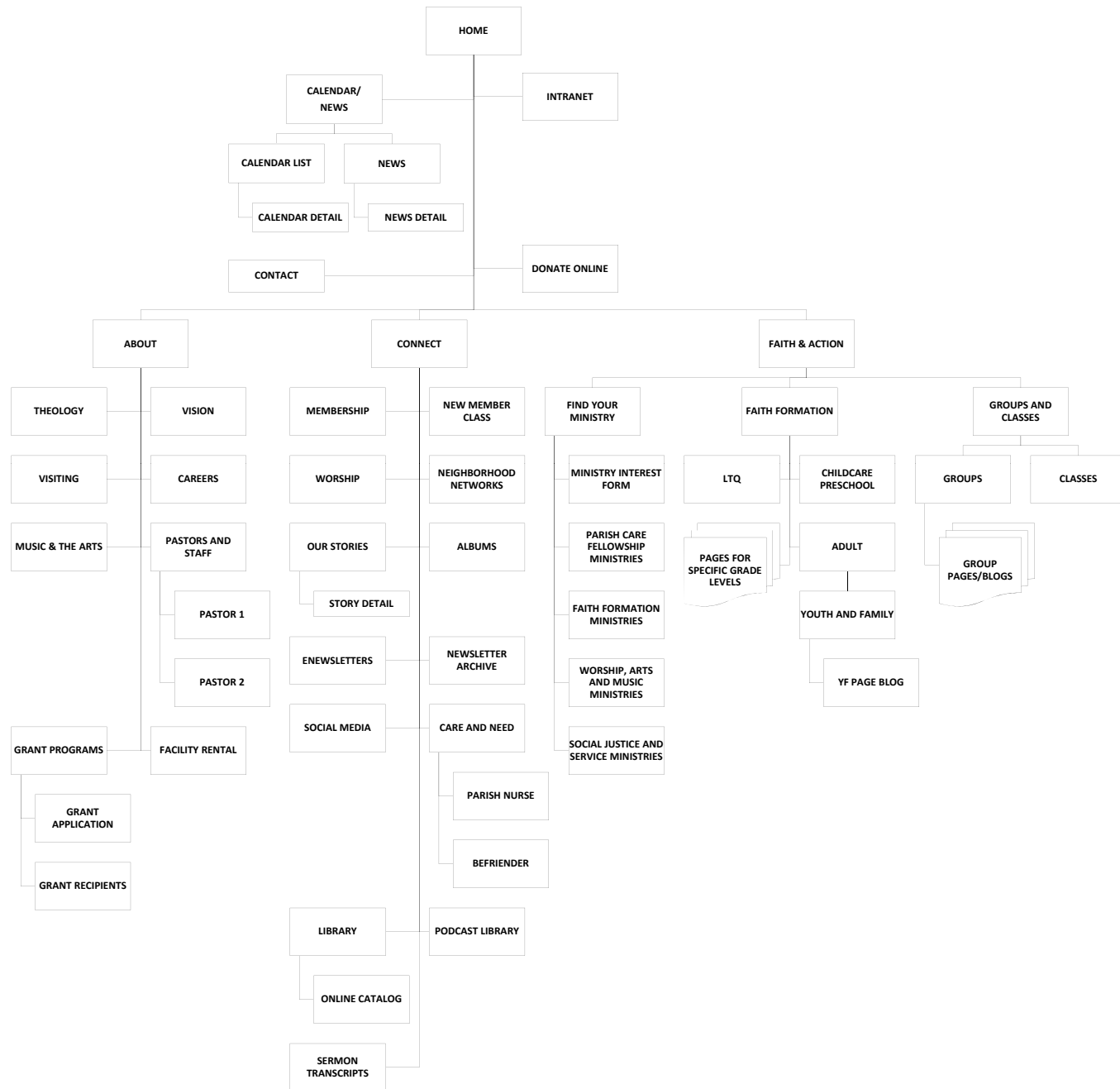
- Cross-platform, multi-browser compatibility, with emphasis on Firefox 3.6, Google Chrome 8, Internet Explorer 8, Safari 5 and Opera 10.
- Optimized for 1024 by 768 screen resolution; use % widths that scale the page to other browser settings
- Compatibility with Google Analytics as system for metrics tracking and analysis

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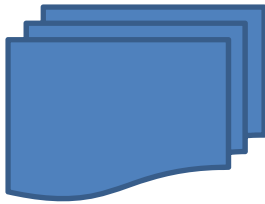
Questions

Hosfeld & Associates will answer questions about this RFP between April 8 to 15.
Please submit questions to hosfeld@hosfeldconsulting.com

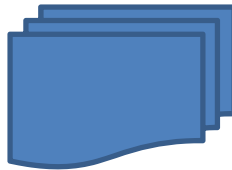


CMS – Digital and Print Outputs

Publications Content



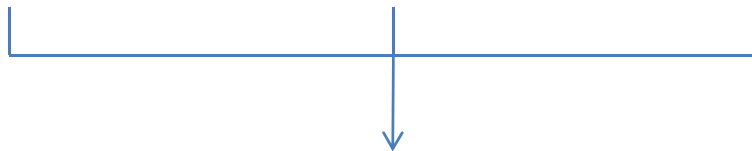
Event Data



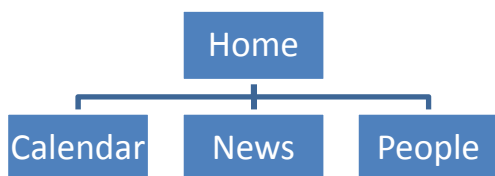
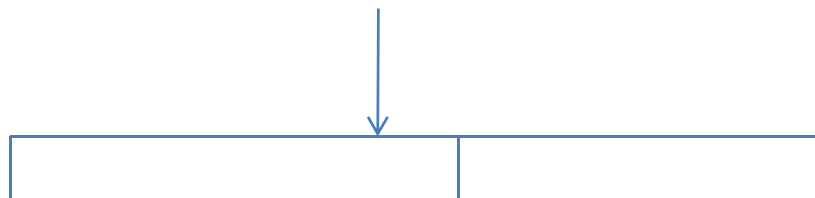
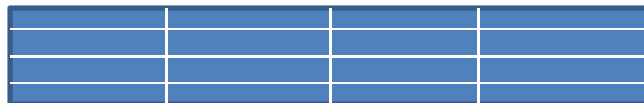
Articles
(Can include flyers,
handouts)



Pictures, graphics



Database



**Web site – Enter
once, shows up
multiple locations**



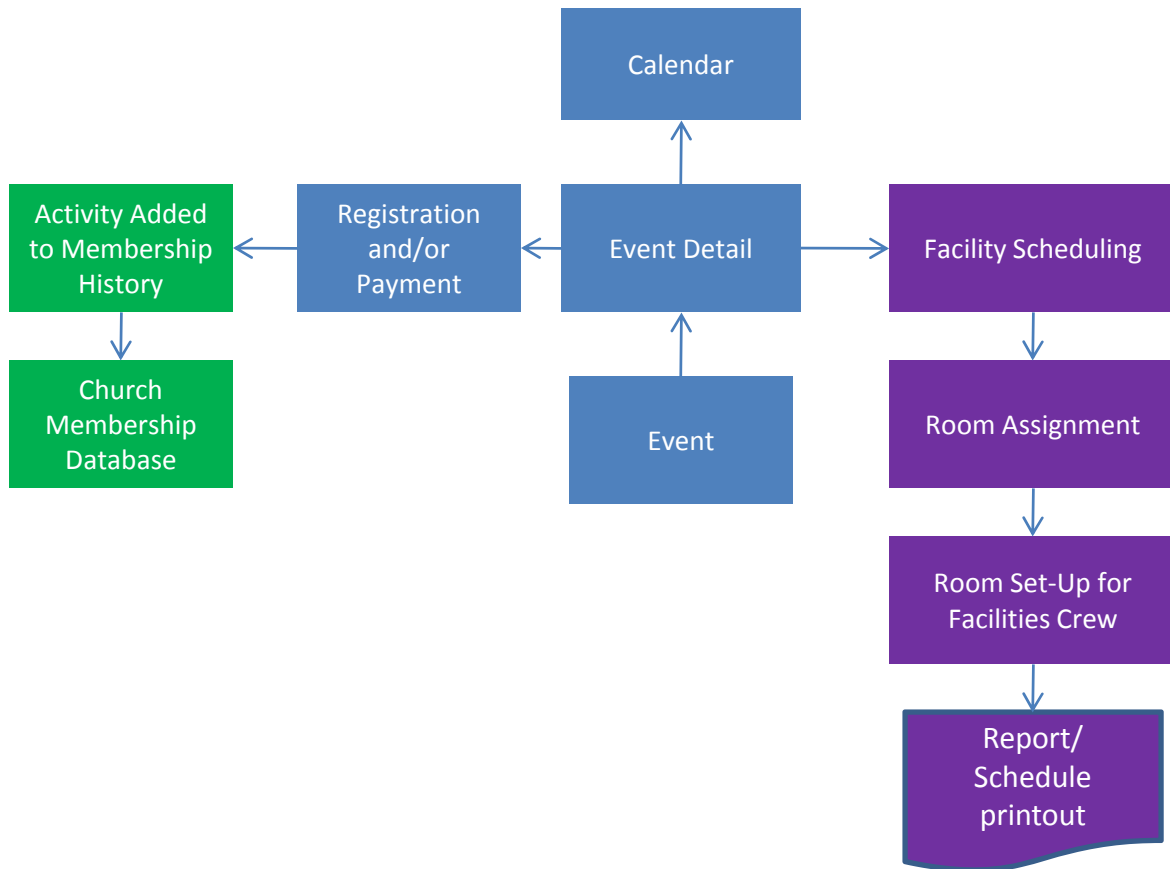
Email Newsletters



**Printable Documents
(8-1/2 by 11)**

**** Mail merge fields**

CMS – Event Information – Integration with Church Database



Calendar View I

About | **Connect** | Faith & Action | Contact

Calendar

Month ▼ Year ▼ ○ List View ● Calendar View

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	1 Personnel Committee	2 OCWM Meeting
3 Denton @ Cheney United	4	5	6	7	8 Committee on Ministry - Westside	9 Spiritual Formation Committee
10	11	12	13	14	15 Annual Conference	16 Annual Conference
17 Annual Conference	18	19	20	21	22 Clergy Retreat	23 Clergy Retreat High School Midwinter

Category

- ☒ Subject
- ☒ Subject
- ☒ Subject

Category

- ☒ Subject
- ☒ Subject
- ☒ Subject

Category

- ☒ Subject
- ☒ Subject
- ☒ Subject

NOTES

Calendar – Calendar View

Calendar View 2

About | **Connect** | Faith & Action | Contact

Calendar

Month ▼ Year ▼ ● List View ○ Calendar View

January 18, 2011 **Annual Conference (Link to Detail)**

All are invited to the annual conference of PNC UCC in Wenatchee.
Subject

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Category

- ☒ Subject
- ☒ Subject
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Category

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Category

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- ☒ Subject

NOTES

Calendar - List View

Main Navigation

Second Level Navigation

Headline

Lorem ipsum dolor Lorem ipsum dolor
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Lorem ipsum dolor Lorem ipsum dolor
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Static photo /Video (Optional)

Subhead

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NOTES

Text & Link

Used throughout the site where the page contains mainly text with one main photo or visual element.

Main Navigation

Second Level Navigation

Headline

Subhead

Lorem ipsum dolor Lorem ipsum dolor Lorem ipsum dolor Lorem ipsum dolor
Lorem ipsum dolor Lorem ipsum dolor Lorem ipsum dolor Lorem ipsum dolor
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Static Photo or
Graphic

Subhead

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Graphic

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Static Photo or
Graphic

NOTES

Text & Link List with Small Photos

A page used for short bios of people with their pictures; a list of committees/groups, a list of locations with photos, etc.

People and Group Page

About | **Connect** | Faith & Action | Contact

Ministers | Staff |

Name, Title

Biographical Text

Profile Photo

Contact Information
Email Form

Links

Title (Link) Slideshow

Title (Link) Someone's web site

Resources

Title

Description

Title

Description

January 18, 2011

Meditation on the Parable of the Mustard Seed

Text text text text text text text text text text text text text text.

January 17, 2011

Meditation on the Parable of the Sower

Text text text text text text text text text text text text text text.

January 16, 2011

Meditation on the Parable of the Good Samaritan

Text text text text text text text text text text text text text text.

Archive

Month, Year

Month, Year

Month, Year

NOTES

Bio Page (Featured Person)

A page specifically for key people in the conference

Includes bio, photo, a blog, links, and a place for resources

Blog entries link up with central blog/news display

MAY ALSO BE USED FOR GROUP PAGES BLOGS – Difference likely to be call to action about “joining this group.”

Page Specifications

CMS (Backend)

Pages | Events | Articles | Newsletter | Uploads

Home

Page Name

Page Name

Page Name

Page Name

Page Name

Page Name

Page Name

Page Name

Page Name

Page Name

Page Name

Page Name

Page Name

Page Name

NOTES

Content Manager Home

- Organization is simple list hierarchical list showing subordination of pages within

CMS (Backend)

Pages | Events | Articles | Newsletter | Uploads

Page

Meta Title

Meta Description

KeyWords

Page Heading

Body Text



Keywords

Image

Browse || Upload

NOTES

Page Content Entry

- Images acceptable for upload include photos and graphics, slideshow

CMS (Backend)

[Pages](#) | [Events](#) | [Articles](#) | [Newsletter](#) | [Uploads](#)

Date	Name	Group	Published Y/N	Publish Date/Time
Date	Name	Group	Published y/N	Publish Date/Time
Date	Name	Group	Published Y/N	Publish Date/Time
Date	Name	Group	Published Y/N	Publish Date/Time

NOTES

Events List Page

- Simple list

CMS (Backend)

Pages | Events | Articles | Newsletter | Uploads

Event ID		Reviewed	
Name		Initials	Date
Date		Initials	Date
Time			
Abstract	140 characters.		
Full Text	600 characters.		
Location			
Contact 1	Name	Phone	Email
Contact 2	Name	Phone	Email
URL			
Group			
Type			
Push To	☐ Newsletter ☐ Calendar ☐ News Feed		
Associate			
Graphic	Browse Upload		
Save			
Publish			

NOTES

Events Data Entry

- Types is a drop-down menu (Class, Meeting, Concert, Speaker, Interfaith, Public)
- Push To: Event information is pushed out to Calendar, Newsletter system, News feed and Group page
- Associate Allows Event Detail page to link to an article that may be written on the same subject as the event (Articles can also be associated with Events)
- Content Submitters can Save into the system
- Only Editors can see the Publish button, see who has reviewed and approved

•Note: Location would likely be the specific room at Plymouth where the event takes place. With the addition of one more field (room setup instructions) this part of the database could be used (with appropriate reports) for facilities management.

CMS (Backend)

Pages | Events | Articles | Newsletter | Uploads

Headline	Author	Published Y/N	Publish Date/Time
Headline	Author	Published y/N	Publish Date/Time
Headline	Author	Published Y/N	Publish Date/Time
Headline	Author	Published Y/N	Publish Date/Time

NOTES

Articles List Page

- Organization is simple list show sorted by submission order

CMS (Backend)

Pages | Events | Articles | Newsletter | Uploads

Author		Reviewed	
Title		Initials	Date
Abstract	140 characters.	Initials	Date
Full Text	B I 1000 characters.		
Push To	☐ Newsletter ☐ Calendar ☐ News Feed ☐ Author Page		
Associate			
Graphic		Browse	Upload
Save	Save		
Publish	Publish		

NOTES

Articles Data Entry

- Push To: Event information is pushed out to Calendar, Newsletter system, News feed and Group page
- Associate Allows Event Detail page to link to an article that may be written on the same subject as the event (Articles can also be associated with Events)
- Content Submitters can Save into the system
- Only Editors can see the Publish button, see who has reviewed and approved

CMS (Backend)

Pages | Events | Articles | Newsletter | Uploads

Newsletter ID
Newsletter ID
Newsletter ID
Newsletter ID

NOTES

Newsletter List Page

- Organization is simple list showing most recent newsletter first

CMS (Backend)

Pages | Events | Articles | Newsletter | Uploads

Newsletter ID

Add Article Browse || Select

Add Event Browse || Select

Order of Items

Generate HTML

Articles

Headline
Headline
Headline

Events

Date Name
Date Name
Date Name

NOTES

Newsletter HTML Generator

- User creates identifier for Newsletter (i.e March 24, 2011 The Vine)
- User can select news items and articles to be included in that newsletter
- Newsletter will contain name, headline, abstract and link to detail published on the website.
- Page generates custom HTML to insert in newsletter distribution system such as Vertical Response or Constant Contact

CMS (Backend)

Pages | Events | Articles | Newsletter | Uploads

(Add New)

Images

Item

Item

Item

Documents

Item

Item

Item

Audio

Item

Item

Item

Video

Item

Item

Item

Slideshows

Item

Item

NOTES

Add/Edit Uploads

- Ability to upload assets and also generate distinct URL for linking

CMS (Backend)

Pages | Events | Articles | Newsletter | Uploads

Name
Type
Thumbnail

UPLOAD / DELETE

url: <http://www.domain.com/whereitis>

<Images

Item
Item
Item

< Documents

Item
Item
Item

< Audio

Item
Item
Item

>Video

>Slideshows

NOTES

Add/Edit Uploads

- Upload documents, graphics, audio and video.
- System generates an URL for the file that can be linked to in body text