

Hidden Gems Inc. Request for Proposals: Web-based Intervention Tracking System

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Summary

Hidden Gems, Inc. is accepting proposals to design and develop a website for the organization. This will be a design to completion project. 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.

Proposal Guidelines and Requirements

1. This is an open and competitive process.
2. Proposals received after **[time, timezone, day of week, date]** will not be reviewed or considered.
3. The proposal must contain the signature of a duly authorized officer or agent of the company submitting the proposal.
4. Price quotes 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.
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. In your proposal please provide the name, address, and EIN of the sub-contractor. Hidden Gems, Inc. will not refuse a proposal based upon the use of sub-contractors, but we retain the right to refuse the sub-contractors selected.
6. Provisions of this RFP and the contents of the successful responses are considered available for inclusion in final contractual obligations

Contract Terms

Hidden Gems, Inc. will negotiate contract terms upon selection. All contracts are subject to review by Hidden Gems, Inc. legal counsel, and the project will be awarded upon signing of an agreement or contract, which outlines terms, scope, budget and other necessary items. Once the web site has been completed and accepted by Hidden Gems, Inc., the web site design and all of its contents, software and architecture become property of Hidden Gems, Inc.

Objectives

Public high school staff need an automated, streamlined, and secure system for initiating, administering, tracking, and rating student disciplinary interventions. They also need an online directory of community-based organizations that can provide intervention services.

Project Details

Hidden Gems, Inc. envisions a secure website accessible from both within school networks and from anywhere with an Internet connection. Appropriate staff would login to the website to establish student profiles, create interventions, track and rate those interventions, and approve or reject service providers. The website would notify users and service providers via email and SMS of status changes of interventions, upcoming appointments, and approaching deadlines.

Functional Requirements

1. The website must interface with existing student record systems so website users do not need to re-input student profile information.
2. Each student profile needs to be associated with one or more interventions and each intervention is associated with zero or more service providers.
3. Each student intervention must support zero or more annotations by the designated counselor.
4. Each intervention must support a workflow consisting of multiple statuses and notifications via email and SMS.
5. Statuses must support assignment of interventions to different users of the system.
6. The website must support uploading of documents (PDFs, Word files, etc.) which can be linked to from the student's profile.
7. Each intervention must support a rating and subsequent reporting on that rating to track the effectiveness of interventions and service providers.
8. The website must support potentially thousands of student profiles with dozens of interventions and thousands of service providers.
9. Student and service provider profiles must be searchable.
10. All update activity on the website must be auditable and reports generated from the audit logs.
11. Information gathered via the website must be exportable to CSV or Microsoft Excel format for potential follow-on processing and reporting done outside the system.
12. Site must be built in accordance to the Web Content Accessibility Guidelines 1.0, provided by the W3C.
13. The site must 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.

Non-Functional Requirements

1. Website must support Internet Explorer 6 and above.
2. Mean page load time, except for reporting, must not exceed 5 seconds on the baseline Internet Explorer 6 browser on a minimum 768 Kbps downstream DSL connection.
3. The necessary infrastructure must be in place to ensure that failure of a major component of the website (webserver, database server, etc.) is recoverable within a single business day.
4. At least one system training session must be provided. This session must be tailored to the non-technical target user audience described below.
5. Online system documentation must be provided. This will consist of:

- a. A **How-To Manual**, written for the non-technical target audience of system users.
- b. A **Style Guide** describing the fonts, colors, and design semantics of the site.
- c. A **Runbook**, describing system setup and configuration and all maintenance processes, including backup procedures, batch reporting, email and SMS notification system, third party software inventory, partner contact information and support escalation process.

Target Audience

1. School deans and counselors responsible for student disciplinary interventions.
2. School personnel responsible for creating accounts and approving community service providers.

Security

Only appropriate staff would have password-protected accounts on the website. Public access would be limited to a form page that community-based intervention service providers would use to submit requests for inclusion in the intervention services directory. Beyond that, there would be no public access. All student data stored on the website must be encrypted to preserve students' privacy in event of a website break-in.

Timeline

1. Proposals are due no later than **[time, timezone, day of week, date]**.
2. Proposals will be evaluated immediately thereafter. During this time interviews at our office with our evaluation team may be required.
3. The name of the firm selected will be decided on or about **[time, timezone, day of week, date]**.
4. Negotiations will begin immediately with the successful candidate and should conclude no later than **[time, timezone, day of week, date]**.
5. All other candidates will be notified on or about **[time, timezone, day of week, date]**.
6. The project must be completed and delivered by **[time, timezone, day of week, date]**.

Budget

The submitted budget must encompass all production, hardware purchases, and software licensing expenses necessary for the development and ongoing maintenance of the website. Hosting will be addressed separately and costs for hosting are not included in the budget for this project. Proposals should itemize the costs of:

1. Discovery, Requirements Planning & Site Definition
2. Site Development, Testing and Deployment

Hidden Gems, Inc. has allocated \$5,000 for this project.

Project Scope

The scope of this project is to design and develop the website described above. A firm that can handle all project planning, interface design and production is required. The technology solution provided must allow non-technical staff to easily and cost effectively update and export site information without engineering resources. The project engagement will consist of the following steps:

Discovery

Confirm audiences, objectives, graphic look and feel, navigation, site marketing, technology issues and assumptions, required functionality, phasing, and budgetary constraints. The firm's understanding of the scope of the project will be detailed in a creative brief. This brief will be reviewed and approved by both parties before site design begins.

Visual Design

Website information architecture, graphic look and feel, user navigation, home page and section page navigation templates, data entry screens, and report screens. The firm will produce a set of nonfunctional mock-ups showing each type of screen. Mock-ups of key frames in the website workflow (sample filled-in data entry screen, sample filled-in report query screen, sample data details screen, sample report listing screen, etc.,) will also be provided. These mock-ups will be reviewed and approved by both parties before site construction begins.

Logical Design

Data dictionary and data flows, process flows, system input/output, website architecture, and logic and design semantics. The firm will produce a set of flowcharts and wireframes showing the logical design of the site. These diagrams will be reviewed and approved by both parties before site construction begins.

Site Construction

Two review/approval checkpoints, an alpha website and a beta website, must be provided during site construction. The alpha website will be data storage complete with a majority of workflows implemented, though not design, data outflows, APIs, or performance optimization complete. The alpha website will be reviewed by both parties for adherence to requirements as described in this document and the creative brief. The beta website will be functionally complete with final performance optimization and visual design adjustment still outstanding. The beta website will be reviewed by both parties for adherence to requirements as described in this document and the creative brief. The website will be considered complete once it has cleared testing.

Testing

The firm will provide a test plan in accordance with the requirements as described in this document and the creative brief. The firm is responsible for testing the website on all required platforms to ensure the site works as promised. Hidden Gems, Inc. will provide data entry resources needed for testing and initial data load. Hidden Gems, Inc. will also verify several high-level workflows and user interface elements.

Training

The firm will conduct at least one training session with website users employing the **How-To Manual** as a guide. The manual will be revised after feedback gathered during that training session.

Delivery

The firm will upload the website to Hidden Gems', Inc. hosting provider. The firm will also deliver all site assets: source code, art, documentation, etc., on a CD-ROM.

Resources Provided

Hidden Gems, Inc. will provide the following roles and resources for this project:

1. **Project Liason** - This person will be responsible for sign-offs on key decisions; maintaining the relationship between Hidden Gems, Inc., its board of directors, and the outside stakeholders participating in the project; representing Hidden Gems, Inc. in design and development meetings; and providing copy and any necessary original and stock art.
2. **Data Entry Personnel** - These resources will be responsible for input of data on the website for testing and initial data upload.

Qualifications

1. Provide the URLs of three websites your firm has produced that best reflect your work and relevancy to this project. Briefly describe the role your firm played in each project. Only sites that are open to the public will be considered in the evaluation.
2. Describe your experience in producing sites for non-profit and/or community-focused projects.
3. Provide current reference information for three former or current clients.
4. Describe your firm's organizational capacity to produce our web site (e.g. staff, equipment, software, physical space, office location, etc.).
5. Provide a company profile, length of time in business and core competencies.
6. Describe the percentage of your web staff that would end of working on this project relative to your entire staff (using full time equivalents). For example, if you would use

five staff on the project and you have ten web designers and developers, the percentage would be 50%.

7. Briefly describe your firm's project management process.
8. Describe your testing and support plan.
9. Explain your service level agreement (SLA) structure.
10. Estimate your time frame for project completion. Note that time frames will be part of the negotiated contractual agreement; therefore, a realistic time frame for completion is requested.
11. Describe the terms and conditions of your engagements, including payment terms, limitations on liability, etc.

Evaluation Criteria

Two copies of your proposal must be received via certified mail no later than **[time, timezone, day of week, date]**. Your proposal must include a cost schedule as described above. All costs associated with the delivery of the project must be presented in a flat rate, fee for service format. Deliver proposals to the attention of: **[name, company, address]**.

Proposals that meet the mandatory requirements, as stated above, will be evaluated with the following criteria:

1. **Proposal Suitability** – the proposed solution meets the needs and criteria set forth in the RFP.
2. **Overall Expertise** – recommending and communicating appropriate technical and aesthetic solutions as evidenced by the proposal and references.
3. **Design Sensibility** – Prior work demonstrates artistic and innovative, user friendly interfaces that engage communities and viewers.
4. **Appropriate Experience** – Candidate has successfully completed similar projects and has the qualifications necessary to undertake this project.
5. **Value/Pricing Structure and Price Levels** – The price is commensurate with the value offered by the proposer. As a non-profit institution, Hidden Gems, Inc. 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 Hidden Gems, Inc. supporter and partner.
6. **Depth and Breadth of Staff** – The candidate firm has appropriate staff to develop the site in the time frame required.
7. **Clarity of Presentation** – The information in the proposal is presented in a clear, logical manner and is well organized.
8. **Service** – Demonstrated commitment to high service level agreements (SLA).

Proposal Format

Please use the following as a guideline to format your proposal:

1. **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 35 pages.

2. **Title Page** – Reference the title of this RFP and include your company name, address, web site address, telephone number, fax number, e-mail address and primary contact person.
3. **Cover Letter** – Must be signed by the person or persons authorized to sign on behalf of the company.
4. **Proposal** – Should be organized in the following sequence:
 - a. Executive summary
 - b. Describe your solution, including the features, benefits and uniqueness of your approach.
 - c. Specify and justify your proposed timeframe for delivery of the project.
 - d. List your qualifications.
 - e. List your rate and fees. Identify staff you anticipate working on the project and their hourly rates for work.
5. **Terms and Conditions** – Your terms, conditions, limitations, etc. regarding this proposal.