NEW YORK-NEW JERSEY TRAIL CONFERENCE

REQUEST FOR PROPOSAL (RFP)

Attachment-A: Response Format

2016 Website Implementation Phase

January 11, 2016

Attachment-A
RFP Response Format

1   EXECUTIVE OVERVIEW

1.1   Summary

The executive overview section should include, at a minimum, a summary of the response.

1.2   Exceptions to RFP

The Response will assume a point-by-point acceptance to the RFP and its Attachments. A written list of all exceptions (if any) to the requirements of any sections, must be included, and must identify the specific RFP section to which an exception is made.

2   GENERAL AND ADMINISTRATIVE PROVISIONS

2.1   Vendor Profile

2.1.1   Corporate Description

Describe the Vendor(s) and its/their clients, suppliers and parent organization(s) (if any).

2.1.2   Initial Qualifications

Describe the Vendor's length of time in the business and core competencies. We expect core competency in Drupal, eCommerce, Views, Organic Groups, Theming and CRM. A successful bidder will have strong availability in the Eastern time zone for consultation.

2.1.3   Financial Profile

Vendors must include a credit report from a credit reporting agency indicating the Vendor's credit history for the last seven (7) years. The credit report must be dated no earlier than sixty days prior to the bid submission date.

2.1.4   Personnel

Identify the personnel that will be involved or assigned to the implementation project. Describe the general background, experience and length of employment of managers and officers, their function and responsibilities.

Describe the general background, experience, certification, length of employment, and assigned area of expertise of the individuals involved in the design, development, testing, and project management for this project.

2.1.5   Risk Management

Identify and describe the risk management methods currently in place at the development site, as they would impact costs (i.e., backup systems, redundancy, systems fault-tolerance, etc.).

2.1.6   Contact Information

Responses should be signed, and the contact name(s), email addresses and telephone number(s) of the preparer(s) should be clearly indicated

2.2   References

Provide at least three (3) reference customers for whom you have had arrangements of comparable scale as that anticipated with this project. The following information must be submitted for each reference:

1. Customer name, address, contact person(s) and telephone number(s);
2. A brief description of the nature of the reference site's business;
3. A brief description of the software and hardware in use including specific statements concerning the similarities and differences between the systems proposed and the reference site's system.

2.3   Partners and Subcontractors

Name and describe all partners and subcontractors involved in the implementation of the system, and include their responsibilities. For each partner/subcontractor, include a corporate description (Section 2.1)

2.4   Statements

The Respondent will represent that all work under the agreement will be in compliance with all federal, state and local laws and regulations including, but not limited to, those of non-discrimination and worker safety.

The Respondent will attest that the prices offered are most favored customer pricing and that comparable services are not offered to any other customer at a lower price.

3   SYSTEM ARCHITECTURE AND DETAILED DESIGN

As described in Section-2 of the RFP 'Project Scope', the scope of this RFP is for the Design, Development, and Integration of a website that meets the requirements listed in Attachment-B. A proposed logical and physical architecture has been provided in Attachment-C of this RFP. The Respondent is expected to use this information as the basis for a detailed System Architecture and Design. The use of physical, network, process and logical views of the components and subsystems will be of assistance in assessing the Respondent's mastery of the technologies involved.

At a high level, the implementation can be broken down into four areas:

1. Framework migration (i.e., upgrading from D6 to D7)
2. Data migration (i.e., migrating CRM **data** from eBase to CiviCRM)
3. Functionality migration (i.e., migrating CRM **functionality** to CiviCRM; migrating e-commerce functionality from Ubercart to Drupal Commerce)
4. Design (i.e., changes to website layout, design and navigation)

For each of these four areas, the System Architecture and Detailed Design should include a description of the subjects below, where applicable.

3.1 Interfaces

Interfaces to external entities should be described. These interface descriptions should include the nature of the protocol, the type of information being passed, the security provided as well as other pertinent information.

3.2 Hardware and Third Party Software

Describe the Hardware and third party software required for the operation of the website. Clearly describe any licensing or other obligations the Trail Conference will assume from incorporating these components into the system.

3.3 Middleware Tools

Describe any middleware that may be used in the implementation of the systems.

4 SOFTWARE DEVELOPMENT PRACTICES

Good software development practices are necessary for a successful software development project. Please describe in detail the development processes and methods that will be used for this project.

4.1 Documented Procedures

Describe the software development procedures and methods that will be used in this project. Also submit one complete copy of the procedures currently in use.

4.2 Project Management

Describe the organizational structure that will be implemented for this project. Include organizational chart and responsibility matrix. Describe internal escalation and resolution process within this structure and the Trail Conference's involvement in the same. Describe how partners and subcontracts will be managed if used. Describe the Trail Conference resource levels and availability expected for this project (i.e., Project Manager, technical people). Describe the frequency of expected meetings, project tracking and methods of communication.

4.3 Change Management

Describe the change management process that will be used for this project.

4.4 Configuration Management and Source Code Control

Describe the configuration management and source code control systems that will be used for this project.

4.5 Reviews

Describe the design, code and test review processes that will be performed for this project. Describe or propose how the Trail Conference will participate in these reviews.

4.6   Defect Tracking

Describe the defect tracking process, tool, reporting and analysis that will be used for this project. Describe how the Trail Conference will have visibility to the defect list and status.

4.7   Unit Testing

Describe the test plan preparation, testing procedures and tools that will be used for this project.

4.8   Systems Testing

Describe the process for test plan generation, testing procedures and tools that will be used for this project. Describe how a hardware platform separate and distinct from both the development and production platforms (i.e., a staging environment) will be established for Systems Testing.

4.9   Documentation

Describe the documentation that will be written for the system. Identify the documents that will be delivered to the Trail Conference.

4.10   Training

Describe the training materials and procedures of the operations, customer service and technical support staff that will be used for the initial deployment and ongoing turnover and expansion.

4.11   Oversight

The Trail Conference requires oversight and participation in the development process. Describe how your development team plans to integrate the Trail Conference into their day-to-day process as well as support wider review of milestone events.

5   POST DEPLOYMENT SUPPORT

Once the website has been delivered, defects will continue to be discovered and enhancements scheduled. The Respondent shall propose several options describing how they will support problem resolution (with response time schedules) and the various scenarios that the Trail Conference may exercise for future development.

6   PRICING

The Respondent shall propose a firm fixed price or a cost estimate based on Time and Materials, for each of the tasks described in the project scope (Section 2.1 of RFP) and further clarified in the Attachments. All costs and fees must be clearly described. The Respondent is requested to provide the details which make up the fixed price, including: 1) description of resources and associated rates; 2) estimated time in man-months; and 3) estimated time in calendar months. Also include estimated travel and or daily allowances for travel.

If third party software is required for the implementation, the initial purchase price and expected licensing costs should be provided.

If a change in hosting is being proposed, the proposal must show the delta in costs.

If a phased delivery of features and functions is being proposed, the pricing details for each phase should be provided.

The Trail Conference payment terms are Net 30 from receipt of invoice. All payments will be tied to a milestone or deliverable. Please ensure your Project Plan identifies or defines major milestones and deliverables.

If there are any requirements that significantly impact the price, please state those requirements or collection of requirements and suggest how they may be modified and the magnitude of impact they would have on the price. Complete descriptions of these issues should be contained in Section 8.

7   IMPLEMENTATION AND SUPPORTING MATERIALS

7.1   Schedules and Project Plan
Develop and submit a Project Plan that will meet the Trail Conference deployment goals. This plan must identify a delivery/deployment date for major functions, allowing reasonable schedule time for review and acceptance of these functions. If a phased delivery of features and functions is being proposed, this must be clearly described in the plan.

7.2   System Documentation
Provide a listing and description of all system documentation that will be included with each deliverable. This should include, but not be limited to, architecture documents, design documents, source code, operations manuals, user's manuals, and training manuals. Only a listing and description is required.

8   ADDITIONAL RECOMMENDATIONS FROM RESPONDENT