

Tab 12- LHCC Website Development RFP

Lake Holiday Country Club, Inc.

Website implementation Request for Proposal

DRAFT

Contents

- INTRODUCTION4
- Statement of Document Purpose.....4
- Proposal Schedule5
- Existing environment.....6
 - Background.....6
 - Current LHCC Location and Employee Count.....6
 - Current Computing Environment & Number of Users.....6
- VENDOR REQUIREMENTS & INSTRUCTIONS7
 - RFP Questions.....7
 - Delivery.....8
- Vendor Presentations.....8
- TERMS AND CONDITIONS.....8
- Information Access.....8
- Contract Duration.....8
- Expenses.....8
- Response Preparation8
- Staffing9
- SCOPE OF THE RFP.....9
- Proposals10
 - Pricing.....10
 - Project Management.....11
- Mentoring staff11
- Optional Services.....11
- VENDOR QUESTIONNAIRE.....11
 - General Information.....11
 - Customer Base and References.....12
 - Warranty Period.....12
 - Implementation & Consulting Costs12
- Budget12
- Implementation Services.....12

Methodology12

Training & Technology Transfer12

Documentation13

Data Conversion13

Project Management.....13

LHCC Resources13

Invoicing and Payment13

Detailed System Requirements13

NOTE TO VENDOR13

Suggested Proposal Outline14

INTRODUCTION

Lake Holiday Country Club (LHCC) is a gated community encompassing approximately 1900 acres located 15 miles northwest of Winchester, Virginia.

We are a private community, with 1931 properties. Each property owner is granted membership rights, responsibilities, and member benefits.

Statement of Document Purpose

The purpose of this document is to solicit proposals for implementing a new website solution for Lake Holiday. This solution is intended to form the basis for future systems and programs within LHCC for the next three years and beyond.

LHCC's current solution is based on QuickBooks Desktop, Microsoft 365, WordPress, and MailChimp. It is a homegrown solution that we have outgrown. As LHCC continues to modernize its operations, LHCC seeks to implement a workflow-driven system capable of supporting the organization through the next phase of its evolution.

Proposal Schedule

Website Implementation

Proposal Release Date: Nov 15, 2022

Questions Due: Dec 1, 2022

Proposal Due Date: Dec 12, 2022

Finalist notified: Feb 1, 2023

Existing environment

Background

Current LHCC Location and Employee Count

Our office Location: 1045 Lakeview Dr, Cross Junction, VA 22625. We currently have 8 staff that will need varying levels of access and training.

Current Computing Environment & Number of Users

LHCC desktops are all Windows. We have a few tablets and iPhones as well.

LHCC leverages MS Office 365 for email, collaboration, document storage, and workflow processing. We are using a combination of many MS Office utilities, including Exchange, Teams, SharePoint Online lists and libraries, OneDrive, Power Automate, Power BI.

We currently use WPEngine for hosting WordPress and for hosting-based support.

WordPress is the CMS, MailChimp is (currently) the email engine. We use WooCommerce to take ad-hoc payments, but we are NOT integrated into QuickBooks desktop.

The following plugins are active as of 10/12/22:

- Apex Notification Bar
- Better Robots.txt - Index, rank & SEO booster + Woocommerce
- Events Manager
- FileBird Lite
- GP Populate Anything
- Gravity Forms
- Gravity Forms Mailchimp Add-On
- Gravity Forms Quiz Add-On
- Gravity Forms Signature Add-On
- Gravity Forms Survey Add-On
- Gravity Forms Twilio Add-On
- Gravity Forms User Registration Add-On
- Gravity Forms Webhooks Add-On
- Gravity Perks
- GravityImport
- GravityView
- GravityView - A-Z Filters Extension
- GravityView - DataTables Extension
- GravityView - DIY Layout
- GravityView - Entry Revisions
- GravityView - Maps
- Import and export users and customers
- Jetpack

- LoginPress - Customizing the WordPress Login Screen.
- Media Library Assistant
- Members
- MonsterInsights - eCommerce Addon
- MonsterInsights - Media Addon
- MonsterInsights Pro
- Product Table for WooCommerce by codeAstrology (WooproductTable)
- Redirection
- Show Net Revenue from WooCommerce Stripe Gateway
- Stream
- The Events Calendar Extension: V1 Shortcode No-Categories Fix
- User Login History
- WooCommerce
- WooCommerce Gravity Forms Product Add-Ons
- WooCommerce Name Your Price
- WooCommerce Processing Fee
- WooCommerce Shipping & Tax
- WooCommerce Stripe Gateway
- WP FullCalendar
- WPMU DEV Dashboard

VENDOR REQUIREMENTS & INSTRUCTIONS

RFP responses are to consist of the following two (2) required components which LHCC views as the basis of your response

- Proposal Document. Please provide the complete proposal, company background, and all details except price. Please do not mention pricing in the proposal document. Since cost is easily compared across proposals, we want our evaluation team to consider the submission fully without cost consideration.
- Cost and Schedule Document. Please provide the following:
 - Initial implementation schedule and cost
 - Ongoing support cost estimates for 3 years

RFP Questions

Our objective is that we provide you with all the information you need in order for you to provide the most complete response to this RFP as possible. As such, we welcome all questions which you might have.

Delivery

RFP responses (the proposal, required documents, and optional supplemental information) are to be e-mailed only.

Vendor Presentations

Two rounds of vendor presentations will be conducted during the RFP process. After all RFP responses have been evaluated, LHCC will select vendors that appear to best serve its interest. Selected vendors will be invited to provide an initial webinar presentation to LHCC. Initial demonstrations will have a duration maximum of two hours.

After the initial demonstrations have been evaluated, LHCC will select the vendors that appear to best serve its interests. Each of these vendors will be invited to provide final presentations and updated cost proposals to LHCC.

TERMS AND CONDITIONS

Vendors are required to adhere to the below terms and conditions.

Information Access

The information provided within this, or any other document supplied by LHCC, is to be considered strictly confidential and shall be considered proprietary to LHCC. This information is not to be shared with individuals outside of your organization unless LHCC has specifically provided written consent allowing said individuals access to this information.

Contract Duration

For purposes of this RFP, prices quoted for software and services to be provided by your organization, or contracted through your organization, are to be valid for a minimum period of 120 days.

Expenses

Any costs incurred by you in preparing and providing a response to this RFP are solely the responsibility of your organization. In addition, should your organization be chosen as one of the organizations asked to provide a final demonstration of your software, the costs associated with that process will similarly be the sole responsibility of your organization.

Response Preparation

Your response should clearly state the ability of your organization to satisfy the requirements defined within this document. In addition, you should provide your most aggressive pricing related to the various components of this RFP. It is the intent of LHCC to use this pricing both as a key element in the ultimate decision regarding the selection of a Vendor, as well as a part of the determination of the budget for the project over the next 3 years.

Staffing

As part of this engagement, it is assumed that your organization will assign project personnel that possess the necessary skills to make significant contributions to the completion of the project. Which personnel are assigned to the project shall be at the discretion of your organization. However, LHCC reserves the right to require the Vendor to remove and/or replace personnel who are not meeting expectations or who do not interact in a positive manner with other project personnel.

SCOPE OF THE RFP

This RFP is a solicitation for information regarding the implementation, support, and maintenance of a CMS and email system that will continue to expand our use of Microsoft 365 through integration. We currently use WordPress. We are comfortable with WordPress, yet we are open to another CMS option if you feel it meets our requirements better.

Our intention is to focus on configuration of our solution instead of customization.

General Website technical overview:

- Role-based access to content, including Pages, Events, Products, Documents, etc.
- Form submissions. A list of current PDF forms is available on our current website. All these forms will be converted to online forms. LHCC has already identified specific workflows that will be associated with each form.
- eCommerce. A list of current products is available on our site. eCommerce will require the expansion of 2 key areas:
 - Member-only product purchase access
 - Approve-then-charge purchases. We have several types of products that will require form submissions AND approvals prior to securing the purchase. For example, we want to allow purchase of Vehicle barcode stickers on the website:
 - Member only process on the website
 - Complete form
 - Upload documents
 - Purchase barcode stickers.
 - Office staff validation of documents and form required before charge and fulfillment of product
- Member Only areas, including but not limited to:
 - Member directory
 - Form submissions
 - Update profile
 - Sign up for alerts
 - Video streaming, i.e. member-only videos
 - Photo and document storage
 - Calendars

- All Website Form submissions and general profile to be submitted or synchronized to SharePoint Online for workflow management. We are open to leveraging any automation tools, including but not limited to PowerAutomate, Zapier, Make, etc.

Important Note: QuickBooks Desktop integration is NOT in scope of this RFP. All website transactions will be manually reconciled with QuickBooks Desktop. If you have experience integrating with QuickBooks Desktop, please include pricing and approach as a 3rd proposal document for consideration.

Our RFP process will be used further refine our business processes and use of software, and we expect it to identify a long-term technology implementation and support partner.

During this process, LHCC will identify any specific software product(s), plugins, addons, or services that provide the best customization to fit our defined business requirements for our new business information system, and provides a high-level of configurability and extensibility, as assessed through a quantitative feature and function evaluation process.

LHCC is most interested in identifying the organization which we feel will represent the best “partner” for our organization in implementing our software by conducting interviews with project team and by talking with current customers. We

Utilize the core business processes inherent within the chosen software elements to provide the basis for updating our existing internal business process, including re-engineering of necessary business processes, to be in line with the processes of an overall new system.

Proposals

Pricing

Your response concerning costs should be a separate document and define the detail of how you price your product. It should include all costs necessary to implement the solution, and it should include the price to purchase any recommended software solutions.

Please include costs associated with any software, installation of the software, training of users and technical personnel in the use, operation, and maintenance of the proposed product(s).

Maintenance costs should include all costs associated with software patches, new versions, and any expected complete redesigns of the application(s) in the foreseeable future.

Also included should be any costs associated with other products (integration tools, development tools, operating system software, synchronizers, PAAS, SAAS, etc.) that you believe are required to implement and efficiently operate the new business information system.

All pricing information should reflect costs over three (3) years, including estimated increases. Include a budget using your standard pricing model in your proposal, and then summarize and transfer information to tabs ‘ASP Hosted’ and/or ‘Local’ in LHCC RFP Pricing_Response_AMS.xls. If you offer your solution both as a hosted ASP solution and through a locally installed licensing model, provide both estimates.

Project Management

The activities to be provided by the Vendor project manager shall include the following:

- Development of an overall implementation strategy
- Development of technical standards for modifications, security, conversion, and system administration for any content
- Development of a comprehensive implementation plan, including allocation of needed resources
- Development of a project timeline, staging and scheduling
- Development of task management and tracking
- Development of project meetings and documentation

Mentoring staff

As part of the implementation process, we would like our personnel to become familiar with the application changes. We will need to be able to understand how the various aspects of your system can best be utilized by our organization. To continue with process improvement exercises after the completion of the implementation, our personnel must develop knowledge in these areas:

- Assistance and guidance with development and application of the business rules and applying them to the software
- Assistance and guidance with workflow or automation changes
- Assistance in the conversion of existing data

Optional Services

In addition to the standard items listed above, we expect to need assistance in a variety of other areas. These may include, but will not necessarily be limited to, customized design and programming for supported modifications. Please also outline additional services, such as report building or any other implementation support required for the on time, on budget, and successful completion of the project.

VENDOR QUESTIONNAIRE

In this section, we are seeking information regarding the background of your organization to assess the ability of your organization to bring the project to a successful conclusion.

General Information

Vendor should provide general information regarding your organization, including:

- Provide company name and headquarters location.
- Provide length of time in the software product, software services, and consulting business.
- Provide the contact details of persons authorized by your company to conduct negotiations with LHCC.

Customer Base and References

Provide two references that have contracted for the same or similar services. LHCC will likely contact these references at the end of the software selection process as part of the due diligence phase of Vendor selection. In addition, LHCC will only contact these references after the Vendor has specifically been asked to arrange for such contact to occur. The identified customers should be willing to answer questions concerning your company's performance and services.

Warranty Period

The warranty period associated with the software should also be defined within this section. Make sure to specify not only the duration of the warranty period, but also the relationship between the warranty period and the onset of a maintenance and support agreement.

Implementation & Consulting Costs

Since LHCC intends to utilize the selected software Vendor heavily throughout the implementation process, costs associated with the implementation are expected to represent a significant fraction of the total cost. Please include a cost summary that indicates the total estimate for the number of hours you expect the implementation to consume, the hourly cost for an individual in each role, and the estimated total cost. It is the intent of LHCC, as part of its due diligence process, to talk to existing customers and determine how close the actual implementation costs came to the original estimates.

Budget

LHCC expects proposals to range from \$25,000 - \$50,000 for initial implementation costs based on preliminary research. Given this range, LHCC understands that priorities, especially lower ones, will be addressed to varying degrees in terms of robustness of functionality and implementation timing, so vendor will need to show value of their proposed solution.

Implementation Services

Methodology

In this section, we ask that you provide information regarding the implementation methodology which your organization utilizes. Include your proposed project plan/scope of work. This should be framed in terms of the various stages associated with the implementation (e.g., software installation, training, process definition, etc.). In addition, you should identify the tools which your organization utilizes for maintaining the project schedule and required resources.

Training & Technology Transfer

Within this section, please identify the steps involved in getting our personnel familiar with relevant aspects of application. This should include any recommendations which your organization might have regarding training programs. Please describe any ongoing training services you offer or recommend.

Documentation

Please define the type of documentation that you expect to provide. Is it a searchable online version? Is there a data dictionary available for the system? Will you make data flow and process flow diagrams available?

Data Conversion

This section should define the approach you plan to take relative to the conversion of existing LHCC data to the new system.

This should include:

- Data analysis and data mapping
- Conversion tactics
- Data integrity checking and audit methodology
- Post-conversion clean-up

Project Management

LHCC will assign an internal project manager who will be responsible for the overall project management of this process. The LHCC designated individual, in concert with the selected Vendor Project Manager(s), will provide the oversight to insure the successful implementation of the system. This will include the necessary scheduling of LHCC resources to insure their availability at the appropriate time throughout the duration of the project.

LHCC Resources

Within this section, we ask that you identify the recommended resources (both technical and functional user areas) that LHCC should consider for the successful completion of this project.

Invoicing and Payment

Describe your proposed fee schedule and terms. Indicate payment terms regarding any available percentage discount for early payment. LHCC's standard payment term is net 45 days. Make sure to identify any differences between payment terms and conditions associated with software purchases compared to implementation services. Within this section, also define any "acceptance" period during which LHCC can exercise the software and receive a full refund on software payments made if the software does not perform as specified during the sales process.

Detailed System Requirements

The Vendor is requested to complete the detailed system requirements as a part of the RFP response (See Appendix B). The questionnaire further conveys LHCC's interests and requirements for system functionality and provides an indication of the software product's current capabilities and future state.

NOTE TO VENDOR

It is expected that all proposals submitted would be in accordance with what has been clearly outlined in the RFP. Once a bid proposal has been submitted it is final. The time for questions will be from the date you receive the RFP to the date stipulated at the beginning of this request.

Suggested Proposal Outline

The following table summarizes the format suggestion for your proposal document. Please follow this outline closely and limit your responses in each section and each subsection to a few concise paragraphs each in length (no more than half a page). For example, write no more than half a page for each subsection of Implementation Services (methodology, training, documentation, etc.), or each strategic requirement. The only exceptions are the cover letter, executive summary, and proposed solution, which should be limited to one page each, as well as including any template-based documents like your standard offering guides, services guides, samples, scope of work plan.

1. Document
 - a. Cover Letter
 - b. Executive Summary
 - c. Proposed Solution
 - d. Vendor Background
 - e. Customer Base & References
 - f. Implementation Services
 - g. Training Services
 - h. Ongoing Support and updates
 - i. Technology overview
 - j. Specific Software, Tools, Subscriptions
2. Document 2
 - a. Pricing Structure