North Carolina Center *for* Nonprofits



Request for Quote to Upgrade Website

NCNonprofits.org

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Table of Contents

[1. Executive Summary 3](#_Toc88464847)

[1.1 Project Overview 3](#_Toc88464848)

[1.2 Goals 3](#_Toc88464849)

[1.3 Purpose and Scope of this Specification 3](#_Toc88464850)

[2. Project Description 4](#_Toc88464851)

[2.1 Project Context 5](#_Toc88464852)

[2.2 User Characteristics 5](#_Toc88464853)

[2.3 Assumptions, Company and Quote Information 5](#_Toc88464854)

[2.4 Constraints 6](#_Toc88464855)

[2.5 Dependencies 6](#_Toc88464856)

[3. Requirements – Phase I 6](#_Toc88464857)

[3.1 Functional Requirements 6](#_Toc88464858)

[3.2 User Interface Requirements 12](#_Toc88464859)

[3.3 Usability 12](#_Toc88464860)

[3.4 Performance 12](#_Toc88464861)

[3.4.1 Capacity 12](#_Toc88464862)

[3.4.2 Availability 13](#_Toc88464863)

[3.4.3 Latency 13](#_Toc88464864)

[3.5 Manageability/Maintainability 13](#_Toc88464865)

[3.5.1 Monitoring 13](#_Toc88464866)

[3.5.2 Maintenance 13](#_Toc88464867)

[3.5.3 Operations 13](#_Toc88464868)

[3.6 System Interface/Integration 14](#_Toc88464869)

[3.6.1 Network and Hardware Interfaces 14](#_Toc88464870)

[3.6.2 Systems Interfaces 14](#_Toc88464871)

[3.7 Security 14](#_Toc88464872)

[3.7.1 Protection 14](#_Toc88464873)

[3.7.2 Authorization and Authentication 15](#_Toc88464874)

[3.8 Data Management 15](#_Toc88464875)

[3.9 Standards Compliance 15](#_Toc88464876)

[3.10 Portability 15](#_Toc88464877)

[4. Supporting Documentation 15](#_Toc88464878)

[5. Deleted or Deferred Requirements 16](#_Toc88464879)

[6. Critical Dates and Stakeholders 17](#_Toc88464880)

[6.1.1 Staff MOCHA Model [Internal Use Only] 18](#_Toc88464881)

[APPENDIX 20](#_Toc88464882)

[Appendix A. Definitions, Acronyms, and Abbreviations 20](#_Toc88464883)

[Appendix B. Vendor Information, Project References & Quote 21](#_Toc88464884)

[Appendix C. Changes POST Contract Signing 21](#_Toc88464885)

[Appendix D. Migration Tasks, Steps, and Reminders 21](#_Toc88464886)

[Appendix E. Stakeholder Comments, Concerns and Feedback 23](#_Toc88464887)

# Executive Summary

## Project Overview

The North Carolina Center *for* Nonprofits (here in referred to as NCCNP or “the Center”) is building a website the world will look to as a best practice, state-of-the-art model for supporting North Carolina nonprofit organizations and their missions.

## Goals

Listed are top level goals the Center agrees are crucial to the success of this project, and must be met, along with the specific criteria on meeting that goal. They will not change and will be the overruling factor in all design and feature discussions. In other words, these goals will keep the “goal posts” stationary for the vendor.

The new website will...

1. Showcase our commitment to nonprofits, and clearly demonstrate our vision, mission, values, and practices. (CEO sign off on the final Master Punch List or MPL\* see definitions in Appendix A).
2. Quickly provide visitors and members with relevant, reliable, timely, and organized resources (less than 3 clicks/taps).
3. Be quick and easy for Center staff to update their own areas (area stakeholder will sign off on the final MPL).
4. Be easy to use on popular devices and browsers, while ensuring the Center’s resources and membership data remains secure (Tech Director will sign off on the MPL).
5. Be quick and easy to purchase memberships or site content (less than 5 clicks/taps).
6. Seamlessly integrate with Salesforce Customer Relationship Management (SF\* CRM\*) so the Center staff can easily see (and report on) Accounts, Contacts, Leads, Opportunities, Affiliations and Case activity. Model SF leading edge, best practices (Stakeholder signoff on MPL).
7. Ensure Personas\* find their desired resources quickly (less than 3 clicks/taps).
8. Easily allow Personas to navigate the Center’s 3 focus areas: membership, capacity building, and public policy (less than 3 clicks/taps).
9. Images, art, graphics effectively complement the web communication strategies and the Center’s stories (Stakeholder sign off on MPL).
10. Generate 25% more qualified new nonprofit member leads, currently at ~1.2K/mth (7,438 from 5/14-11/16/21 via Google Analytics New Membership Checkout Step 1 Engagement Event).
11. Increase visitor traffic by 25%, currently at ~12.6K/mth (78.3K from 5/14-11/16/21 via Google Analytics New User Acquisitions).

## Purpose and Scope of this Specification

NCCNP hopes to find an established, reputable, reliable, full-service web/app design and development company to overhaul the current website, add features for v3 Phase I, and establish a long-term relationship.

Phase I – Improve Public, Member and Sustainer Use

Please provide a quote to complete these tasks. This section is a brief introduction, with more details and specifications of each task included in section 3.1.

1. Upgrade the look and feel of the overall theme.
2. Upgrade menus and navigation.
3. Create targeted Landing Pages (LP\*) for each persona.
4. Update the Welcome Page (WP\*) for all members/sustainers after login
5. Upgrade and streamline the ecommerce processes.
6. Upgrade and streamline the calendar and event features.
7. Upgrade the appearance and functionality of the Business Finder directory.
8. Update Information Central to an “Information at Your Fingertips” concept.
9. Upgrade the Blog look and feel.
10. Upgrade and streamline integration with SF and Nonprofit Success Pack (NPSP\*).
11. Upgrade and streamline processes to minimize or eliminate manual steps.
12. All content will work and look great regardless of who is accessing it.
13. All content will work and look great regardless of the device, browser, or app accessing it.
14. The website will use native, included and/or readily available integration tools, and NOT CUSTOM 3rd party code or solutions which may not be available or updated in the future.
15. The website will use latest technologies, like HTML5+, CSS3+, PHP8+, etc.
16. All current content will be migrated and present perfectly on the new website.
17. The website will include a Spanish version.
18. Create professional documentation.
19. Plan for a future NCCNP App.
20. Include real time chat feature.
21. Portals for special members or board members to access restricted information
22. An online “Members Connect” area where all members can easily share and discuss issues, with email and text message notifications.
23. Other recommendations from the quoting party.

Phase II – National and Global Use - Not included in this RFQ. Timeline TBD.

This sections if for good ideas which we can’t afford in Phase I, but need to be noted for future consdieration.

1. Personalized WPs for each persona AFTER a successful login

# Project Description

NCCNP provides free and membership-based services and resources for users working at or with nonprofit organizations in the state of North Carolina (herein referred to as “NP or nonprofits\*”). Website visitors (herein referred to as “visitors”) access services and resources via free links, annual memberships, or pay per resource.

With the overall goals of retaining/adding new members, and supporting diverse revenue streams (i.e. affiliates, business ads, job postings, etc.) visitors will be promoted to “persona” based LPs via email marketing, social media marketing, text messaging marketing, Pay Per Click (PPC\*) campaigns, Search Engine Optimization (SEO\*), word of mouth, and all other marketing ideas. Calls to Action (CTAs\*) will streamline adding new members, buying relevant resources, and optimizing quick conversions.

The website must provide a quick, easy, and professional way to access services and resources, while providing transparent, robust security of our valuable assets. It is critical the website be simple for everyone to use, including those with special accessibility needs, and work perfect on all popular web browsers, devices, screens, etc. It is also imperative the site be automated as much as possible to eliminate manual processes.

## Project Context

After two previous upgrades, our site is currently based on Drupal 7 with custom ecommerce code and synchronized with Salesforce. Any Drupal-based proposal must include upgrading to the latest Drupal version; however Drupal is NOT required. Given our past challenges with Drupal and the costs of intermittent upgrading, priority will be given to non-Drupal based solutions.

## User Characteristics

The Center’s primary audience are professionals seeking resources on nonprofit management. The following are persona profiles (visitors/prospects/leads/renewals) which should be carefully considered to create persona-specific LPs which include the **most relevant** summary info, resources (free, gated, and/or ad-hoc), CTA, and clear upgrade/upsell options for that group:

*P1. Potential new member* researching information on creating a new NP in NC (grassroot organizers, un-incorporated orgs, etc.).

*P2. Potential new member* researching resources for their existing small nonprofits.

*P3. Potential new member* researching resources for their existing medium nonprofit.

*P4. Potential new member* researching resources for their existing large nonprofit.

*P5. Potential or current member* researching specific resources for their current role (board member, C level, finance, IT, volunteer, etc.)

*P6. Current member* looking for quick and easy access to existing membership self-help resources like the digital media library (i.e. Info Central, Money-Saving Partnerships list, etc.), job posts, or finding 3rd party help (Business Finder).

*P7. Current member* looking for advanced help like taking the Principals & Practices (P&P\*) assessment, submitting a help case, inquiring about specific resources via AI chatbot, email, text message, or phone support, etc.)

P8. *Non-member nonprofit professional* looking for quick, easy, and organized access to free/public self-help resources like P&P, Legal Compliance Checklist (LCC\*), publications for sale, creating full price job posts, or finding 3rd party help in Business Finder (BF\*)

*P9. Approved 3rd parties* looking to quickly and securely create/update THEIR calendar events, job/resume postings, business finder ads, etc.

*P10. Nonprofit* *professional* looking to advance their career via a new job, expanding their knowledge, continuing education, etc.

*P11. Businesses (firms, consultants, major corporations)* looking for direct marketing and/or partnership opportunities.

*P12. Donors (businesses, associates, individuals, etc.)* seeking to donate and/or activate their sustainer benefits.

*P13. Grantmakers* (foundations, etc.)

*P14. Policy Advocates* (employed at nonprofits, government agencies, legislatures, universities, etc.).

*P15. Individuals looking to volunteer* (with the Center as Pro Bono Volunteer (PBV\*) or with other NPs).

## Assumptions, Company and Quote Information

The vendor must have a proven track record of successfully designing, developing, rolling out, and maintaining high volume, super reliable, super secure solutions continuously for the last 5 years. ***In Appendix B, please provide the following:***

1. Vendor company and contact information, as well as other products and services you provide.
2. Project description, URL\* link(s) and customer contact name, phone number and email address to at least 10 previous projects, with the solutions most like ours listed on top.
3. If possible, include analytics on each project’s website traffic increases, SEO successes, etc.
4. Your final quote for this project. Provide separate price quote(s) for optional sections. Email your quote to ptronnier@ncnonprofits.org

## Constraints

There are currently no constraints on design options or recommendations. We will consider any/all solutions regardless of platform or framework, but the vendor must be very clear on their recommendations and benefits.

## Dependencies

The following dependencies affect the requirements:

* The site must integrate and update with current versions of SF Lightning Experience edition (desktop and mobile) and SF Nonprofit Success Pack (currently NPSP\* 3.0) through FINAL PAYMENT DATE (see section 6 - Critical Dates and Stakeholders). Learn more here: https://www.salesforce.org/nonprofit/nonprofit-success-pack/
* The site ecommerce must support Stripe, the Center’s current payment processing gateway.
* The vendor’s solution MUST adhere to long established procedures for WordPress or other Content Management Systems (CMS\*) child theme, plugins, and widgets development, and MUST NOT break or have bugs when WordPress or other CMS software, themes, frameworks, modules, plugins, or any other standard/included features are updated through FINAL PAYMENT DATE. This applies to all the parts of any proposed solution.
* The site must integrate with current versions of Constant Contact (CC\*) through FINAL PAYMENT DATE.
* The site must integrate with current versions of Google Analytics (currently v4) through FINAL PAYMENT DATE, without losing any historical data.

# Requirements – Phase I

## Functional Requirements

1. Upgrade the look and feel of the overall theme.
2. Include hero section for images, slides, video clips, etc. on home and Landing Pages (LPs), similar to <https://www.adoptalovestory.com/>, and provide those same content creation options for Center staff.
3. Include sections for the marketing team to quickly update content based upon current campaigns, complete with slides, animation objects, etc.
4. All pages and sections will be easy for the marketing team to add, change, or delete.
5. Content must be consistent with the Center’s logo, fonts, colors, images, and other branding.
6. Include mini email and cell phone sign up sections and pop-up forms based on visitor movements, which auto-update lists in ~~Constant Contact~~, SF, text messaging, etc.
7. Include an easy to use, drag and drop content editor.
8. To help reduce overall costs, starting with an existing professional theme template should be considered. See <https://www.templatemonster.com/>.
9. Upgrade menus and navigation.
10. Simplify and streamline menu options so important content can be reached in under 3 clicks.
11. Menus must be easy to change by staff.
12. Menus should accommodate text, icons, images, and other rich text.
13. Provide sticky menus, sub menus, and other advance placement options.
14. Present best practice ideas in website navigation.
15. Provide options similar to <https://www.councilofnonprofits.org/>
16. Create targeted LP for each persona.
17. Stakeholders are assigned to represent each persona, and will work with the vendor to design the content, CTA, etc.
18. For example, a grassroots visitor LP would display images, slides, and resources geared towards starting a NP, whereas the CEO of a large NP would see leadership images and summary executive-based resources.
19. Each LP should integrate with SF to record visitor and member (logged in) touches, interests, etc.
20. Each LP should integrate with Google Analytics (GA\*), tracking all relevant marketing and conversion data points.
21. Update the Welcome Page (WP) for all users after login
22. Organize and optimize the content members see after successful login.
23. Simplify and streamline the account creation process, which has too many steps.
24. Simplify and streamline the login and password reset processes.
25. Upon successful login, allow members to stay logged in without re-authentication for up to 90 days.
26. Priority 4 - Switch from the current model where we track primary and secondary membership account access, to supplying only one login ID and password, and the member organization decides who uses it.
27. Vendors, please work through the “Become a Member” -> “Join Online Now” -> “I want to create an account” steps and include ***“Website Vendor Tester” as your Job Title***. Of course exit the process before the final purchase.
28. Priority 1 - Upgrade and streamline the ecommerce processes, including processes that require login versus those that do not.
29. Simplify and streamline new member signup process and renewal process.
30. Simplify and streamline members discount purchases and access to authorized content.
31. Simplify and streamline ad-hoc Center-owned resource purchases / downloads (i.e. Joe Public, non-member wants a couple of Center-produced reports. This mostly pertains to future documents, training, etc.).
32. Simplify and streamline job/resume posting process.
33. Simplify and streamline donations by Business Sustainers/Associates and access to content.
34. Simplify and streamline donations by individuals (see <https://www.stjude.org/donate/donate-to-st-jude.html>). We have both Stripe and PayPal.
35. Simplify and streamline Business Finder ad purchase, approval, renewals, etc.
36. Simplify and streamline purchases of various event registrations, including annual conference, legal workshops, special programs, one-off webinars (with unique registration), etc.
37. Simplify and streamline purchases of previous/archived webinar recordings of trainings, etc.
38. Simplify and streamline purchases of publications, and access or download
39. Simplify and streamline purchases of pay-to-publish job posts or resume posts
40. Simplify and streamline purchases of newsletter ads
41. Simplify and streamline purchases of conference exhibits or ads
42. Ensure flexibility for staff to create new ecommerce webforms/processes as needs arise
43. Ensure NPSP records reflect purchases
44. Eliminate the current “honor” checkout system
45. We envision all resources being marked as free, non-member price, member price, included with membership only, and/or other pricing. Each resource could be gated.
46. We are open to vendor ideas here and expecting to move away from our current Drupal solution.
47. Upgrade and streamline the calendar and event features.
48. Provide a clear but subtle way to indicate which events are the Center’s, vs 3rd party’s events (color code, icons, other?)
49. Ensure events are easy to add, change, publish, and deleted manually or as they expire.
50. Allow feeds, import and export of calendars, schedules, events, etc. from all popular calendar formats.
51. Allow approved 3rd parties to update their own events either manually or via import, followed by the Center’s workflow approval before publishing.
52. Clarify event contact info so the Center doesn't field unnecessary inquiries.
53. Clicking the event contact’s email will create a new email with the To: and Subject: fields filled in.
54. Clarify and standardize on official calendar titles.
55. Allow for adding events via “emailed in” for pre-publish approval.
56. Automated email and text message reminders
57. Include an advanced search section so visitors can quickly narrow down their event interest.
58. Upgrade the appearance and functionality of the Business Finder vendor directory.
59. Simplify and streamline the directory’s front-end user interface to be more professional, including an advanced search feature to find relevant businesses quickly.
60. Allow 3rd parties to easily add, change, or remove their own ads, with Center staff workflow approval.
61. Include at least a logo and promo image upload, automatically sized/formatted to display pleasingly.
62. Streamline checkout, billing, and renewal, including auto expiration dates, renewal emails, etc.
63. Make sure checkout is flexible to accommodate changing price points.
64. Examples/ideas: <https://www.upcounsel.com/non-profit-attorneys-north-carolina>, parts of <https://www.togethersc.org/consultant-directory>, <https://vendordirectory.shrm.org/>
65. New feature: Opportunities to purchase and display “Sponsored” or “Featured” business listing as means for additional revenue
66. Update Information Central to an “Information at Your Fingertips” concept.
67. This search page is the gateway to exploring our extensive resource library. Resources are used to store/display Center publications, archived webinars, and short summaries with links to third parties’ content (the latter is the majority of the library collection).
    1. Some Center publications are for sale, some are free to any visitor but should be gated content, most are free to members with or without being gated. See a breakdown of which resources this applies to in the detailed IC User Story in appendix.
    2. Center archived webinars are for sale.
    3. All other resources are member-only, requiring login to access.
68. The start page will display all of the Center’s resource categories, our most popular titles, and other best practices methods for effective library search starting, filtering and results pages.
69. Include an advance search and filter feature to quickly and easily narrow down and find relevant resources.
70. Update the search interface’s display of results
    1. Show library search results newest to oldest (based on date published on website)
    2. Search results display the fields for Title, Summary, and possibly some icon/indicator of whether it is member-only resource
    3. Search results display icons indicating the resource contains certain media types (e.g. video, webinar, checklist, podcast)
71. Include a simple gated content feature, where staff can easily place Center publications behind a webform that requires visitors’ marketing info (name, email, and/or phone, etc.) before access to the resource is granted. Gated content is applicable to both member and non-member users.
72. Update Resource content type’s page layouts to have a section (e.g. at bottom / to the side) which auto-generates suggestions of related Info Cental content (perhaps based on matching similar titles or keywords).
73. Shift login wall to individual resources’ webpages. Membership only resources would display for logged in members. Visitors and those logged in but not currently members/sustainers see a “Join Now” button or “Add to Cart” if that publication available for sale ad-hoc.
    1. Include prices for members, Sustainers, ad-hoc public (e.g. non-members & non-Sustainers), ad-hoc members, etc.
    2. The public would be able to see the Title, Summary, and get a general sense of the resource, but wouldn’t access the resource specifically. A search parameter that allows the public to search only publicly available (free) resources would prevent them from feeling “nickeled and dimed.”
74. Website Search Result Pages (WSRP\*) would include ALL relative content, including free content, gated content, member only content, blog articles, FAQs, pdf documents, upcoming events, archived content, business finder options, articles, sample policies, checklists, webinars, services, job posting, downloads, etc. (Stakeholders will determine what is NOT to be indexed/public/searchable).
75. Visitors WSRP list may have icons/indicators for new/updated, category, media type (pdf, video, podcast, etc.), access (free, member), etc. as well as text title and summary description.
76. Upgrade the Blog look and feel.
    1. Fine tune how the blog displays based upon best practices.
    2. Make it more visually appealing, while maintaining the current blog's simplicity, including being very easy to read and navigate.
    3. All content must be migrated to preserve on page SEO rankings, including meta, heading, bold, image, div, paragraph tags, slugs, etc.
    4. All look and feel upgrades available in the above section 3.1.1. should be available to use in blogs as well.
    5. Add optional page navigation options, like previous, next, and page number links.
    6. Add optional page info options, like date published, date last updated, author, etc.
    7. Add option to filter/search by topic, Title, Category, Keywords, etc.
77. Upgrade and streamline the integration with Salesforce and NPSP.
78. Ensure all appropriate website actions and events are mapped to Leads, Cases, Opportunities, Contacts, Affiliations, and Accounts (i.e. Member Assistance submission forms mapped to Cases, access to promo assets mapped to Opportunities, etc.).
79. Ensure the Center staff can easily see (and report on) Accounts, Contacts, Leads, Opportunities, and Case website activity (i.e. a member’s account shows all associated member website logins, or a contact shows all website events they signed up for or website purchases they made).
80. Include an easy-to-use website LP and form builder which synchronizes with Salesforce objects.
81. Include time to remove no longer used apps, addons, mappings, etc. from SF.
82. Include example URLs in Appendix B of best practice SF Intergrations.
83. Upgrade and streamline processes to minimize or eliminate manual steps.
    1. In general, the vendor will look for and implement streamlining ideas not covered specifically in other requirements.
    2. Be flexible to design and implement ideas which can be done in under 1 day.
    3. Be flexible to new ideas which come after the project has started, and require excessive resources, hours, custom coding, etc. These would require a separate time/cost quote to be approved in Appendix C – Changes Post Contract Signing.
84. All content WILL work and look great regardless of who is accessing it.
85. Include special needs accessibility options for visually impaired visitors using assistive technology, including the latest American with Disabilities Act (ADA) compliance recommendations and requirements of government and best practice experts.
86. Follow current and anticipated best practices for accessibility.
87. Include staff training for adding/enforcing compliance conforming content where applicable.
88. All content will work and look great regardless of the device, browser, or app accessing it.
89. Provide proof of testing on all Apple and Android phones released within 3 years of LIVE date (see section 6 - Critical Dates and Stakeholders).
90. Provide proof of testing on all Mozilla Firefox, Microsoft Edge, Google Chrome, and Safari browser versions released within 3 years of LIVE date.
91. Provide proof of testing on all Apple, Android, and Amazon tablets released within 3 years of LIVE date.
92. If needed, the website will use native, included, and/or popular/standard integration tools, and NOT CUSTOM 3rd party code or solutions which may not be available or updated in the future.
93. Provide a detailed list of non-standard integration tools, including but not limited to the vendor’s name, how long in business, number of users/downloads, and date it was last updated.
94. All custom code must be very clearly documented not only inline where it is used, called, etc. but also in an external Word doc, including programmer’s name, description of the code, and exactly how it will handle future upgrades.
95. 25% COMMENTS REQUIREMENT! It is critical that all code be commented thoroughly, as this project will evolve in scope. An in-house tool will be used to verify that at least 25% of the code is useful comments.
96. All 3rd party add-ons must have at least 10K downloads AND have been updated in the last 3 months.
97. The idea is to avoid situations where fixes or changes to the recommended solution must be made and the person or company who can make those changes are no longer available. If a custom piece is critical to your solution, exceptions to these requirements must be presented to Paul in writing, and pre-approved by Paul before use.
98. The website will use/support the latest technologies, like HTML5+, CSS3+, PHP8+, etc.
99. A detailed list of all coding technologies, including minimum supported versions, version used, latest version, and vendor’s timeline for the next upgrade, must be included in final documentation.
100. All current content (pages, resources, paid posts, files, images, pdfs, etc.) will be migrated and present perfectly on the new website.
101. Provide a detailed migration plan, approved by the Center’s Sustainability & Data Manager Lynn Brinkley (LB)
102. Include time to test and confirm all content was migrated correctly, and training to keep content perfect.
103. Final data migration will be verified and approved by LB.
104. Current or better SEO SERP levels must be maintained, including keeping existing URLs and providing 301 permanent retracts for those that must change. The center will provide keyword lists for the vendor’s before and after reports.
105. See Migration Appendix D for more info.
106. All content is current, relative and requires no independent review by the vendor.
107. Priority 4 – The website will include a Spanish version.
108. This will be a multi-language site, with a planned roll out to Spanish-speaking audience in Phase I. Open for recommendations here, but proven multilingual best practices must be confirmed, as well as multiple successful multilingual projects listed. All error messages, user direction, etc. should be coded using variables, which can be edited by a backend administrator/translator.
109. Provide a clear process to keep Spanish version in sync with the English version.
110. Provide a clear plan to support other languages in Phase II.
111. Use the language name (i.e., Español) and not a country flag to indicate available versions.
112. Use the visitor’s location to automatically pick the default website language version.
113. Integrate Google’s Translate website API for basic translation into more languages. For example: <https://dorcascary.org/>
114. The Center equity stakeholders will lead in identifying what (if any) staff and board members of nonprofits (the primary audience for Center publications and materials) find English-language materials to be a barrier, and which materials/web pages would be helpful to be translated into another language.
115. Please identify and document what processes will be used to verify that translations are accurate. Many Center materials (e.g. legal compliance materials, finance/accounting materials, public policy resources, Principles and Practices, etc.) include language and terminology that could be inaccurate if translated by someone who is not a content expert.
116. Vendor use of any 3rd parties must be approved by the Center’s equity committee and/or legal counsel.
117. Please include option F above (Google Translate) in your quote, and provide a SEPERATE optional price quote to implement the rest of the above specs.
118. The Center has no Spanish resources and expects the vendor or it’s 3rd party to create and rollout the Spanish site, then Center will be responsible for future content updates.
119. Create professional documentation.
120. It is critical that all code, setup, settings, features, screens, steps, or any other useful information be included in the documentation. Final payment will not be made until all questions about how to install, migrate, setup, configure, optimize, support, maintain, etc. are clearly and concisely added into a user guide of at least 5 pages. ALL technology, tools, languages, apps, etc. which were used must have exact descriptions, version information, URLs to manufacturers, etc.
121. Priority 4 – Plan for a future NCCNP App (the Center has no concrete specs yet).
122. Please include details in Appendix B on past App projects, how many apps you have on Apple App Store and Google Play Store, and how you would generally handle AppDev and rollout in Phase II?
123. Please share any experience, knowledge and recommendations on AMP and PWA technologies.
124. Include real time chat feature.
     1. Seamlessly integrate into website theme.
     2. Makes it very easy for visitors to get real time answers via AI chat bot, with seamless handoff to staff content expert. For example, if a visitor enters “Looking for compliance info” the chat bot could return URL links to compliance resources, and follow up with “Did the results answer your inquiry”.
     3. Very easy for Center staff to monitor real time visitors, supply canned responses, and include or hand off to other staff, if necessary.
     4. Automatically pops up based upon real time visitor tracking, like visiting multiple pages, visiting the contact us page, visiting member support pages, etc.
     5. Must work on cell phones and include chat notifications to staff, and text answers.
     6. Please provide a SEPERATE OPTIONAL price quote for this feature.

1. A page for board members to access restricted information.
   1. Provides access to sensitive board of director's content
   2. Content cannot be indexed by search engines.
   3. If this complicates or greatly increases the quote, a page with the URL not included in menus or linked to (and emailed to board members), with NOINDEX/NOFOLLOW added, would work for now.
2. Priority 4 – An online “Members Connect” area where all members can easily share and discuss issues, with email and text message notifications.
   1. Replaces old Member Connect discussion group
   2. Open for ideas here but if expensive the Center may just use LinkedIn group.
3. Other recommendations from the quoting vendor.
4. This is your chance to share your ideas and include any additional specs. If included, please mark as OPTIONAL with SEPERATE pricing.

Priority Definitions

The following priority definitions are intended as a guideline to help prioritize requirements.

* Priority 1 – The requirement must be included in Phase I. This is the default unless indicated otherwise.
* Priority 2 – The requirement is needed for improved member experience, and the fulfillment of the requirement will create immediate benefits.
* Priority 3 – The requirement is a “nice to have” which may include new functionality.
* Priority 4 – Future feature, unless quick and low cost to include.

## User Interface Requirements

1. All site elements, including but not limited to screens, forms, pages, menus, widgets, images, etc. must be “responsive” and thoroughly tested by the vendor to look and work perfectly on ALL commonly used devices, and all popular web browser vendors and versions (i.e. Microsoft Edge, Firefox, Chrome, Safari, etc.). Cross browser and cross device support must be maintained for 6 months after final payment.
2. The latest standards and best use or best of class concepts should be used on all screens.
3. The latest language standards and version should be used, like HTML5, CSS3, PHP8, etc. or later.

## Usability

The following must be developed and will be signed off on before the final payment is made.

* The main goal is to keep it simple. Added steps or complexities must be avoided and may be included in a final punch list “to simplify”.
* The user documentation and online help (where needed) should be complete.
* If applicable, the help should be context sensitive and explain how to achieve common tasks.
* The system should be EXTREMELY easy for non-tech savvy visitors to navigate and for Center staff to update.

## Performance

This website will be the foundation of future features and revisions. As such, it is critical it be extremely efficient and optimized. The following benchmarks must be proven by the vendor, and will be verified by the Center:

* Speed Test: Vendor tests must show 100 users can register for new memberships simultaneously, without any delays, issues, or errors.
* Stress Test: Vendor tests must show 1,000 simultaneous website visitors will not experience any delays, issues, or errors.
* The current site is hosted at a local company and runs ok, so switching is not a requirement. However, developing and rolling out the new site at GoDaddy (or a similar affordable, stable, upgradable company) is preferred. All hosting company information, including server hardware, server OS, web services, databases, SFTP, SQL, CMS, programming languages, login info, or any other tool/service/process used in the solution must be clearly documented.
* Recommendations on how to setup and achieve optimal performance should be documented as well.

### *Capacity*

See 3.4 above. Please list any limitations to what you are proposing here. If nothing is listed in 3.4.1, it will be assumed there are NO LIMITS to our testing to find bugs.

### *Availability*

The following are our requirements for availability to all stakeholders:

* All features will NOT require the server/website or any process to be down, users logged off, or any reboot or restart.
* If any part of the solution freezes, locks up, or in any way functions abnormally, the vendor must take the lead in debugging until the issue is fixed, regardless of who is at fault. The vendor is expected to take the lead in resolving all technical support issues until FINAL PAYMENT DATE.
* For Phase I, the solution must be accessible from anywhere within the United States and its territories. In anticipation of a global, multilingual future expansion, all vendor concerns about future geographical expansions must be clearly indicated in the final documentation.
* Any downtime is unacceptable. Unless an unforeseen act of nature (vis major/force majeure), the solution must be available 99.99% of the time after going LIVE until FINAL PAYMENT DATE. If the site goes down within this time frame for more than 2 continuous hours, AND the fault is proven to be the vendor’s solution, 10% of final payment will be “credited” towards a future maintenance contract and/or development work for each occurrence.
* Scheduled and/or unscheduled maintenance which requires the solution to be down must be fully documented.

### *Latency*

The vendor agrees to reply to all emails, text messages, and phone inquiries within 2 working/business days, and have no issues unresolved after 2 weeks of the 1st written notice.

Issues involving the solution being “down”, or affecting site income, or other reasonable high priority request, must be replied to within the hour of it being reported, with clear feedback including ***who is working on the request, what they are doing, where the problem exists, why it happened, and how they intend to fix it quickly.***

All requests should be tracked to ensure complete closure. Each open issue not meeting the above guidelines will result in $100 credit towards a future maintenance contract and/or development work.

## Manageability/Maintainability

### *Monitoring*

All requirements for monitoring the website’s health, including but not limited to monitoring availability, ecommerce transactions, failure conditions, error detection, logging, AND correction steps, must be included in the final documentation. In case of issues with critical processes, like checkout not working, issues should be logged and push notifications sent to the admin email(s) AND cell phone number(s) to quickly track down and resolve issues and/or confirm resolution.

### Maintenance

Any attributes of the system that relate to ease of maintenance, modularity, complexity, interface design, database upgrade or migration, hosting upgrade or migration, etc. must be included in the final documentation. All maintenance will be the responsibility of the vendor for 3 months before final payment.

***NOTE\*\*: The Center’s Technology Director has over 20 years' WebDev*** ***experience, and is very well trained in a LAMP\*+WordPress+SF environment. The Center also has an existing annual conference website based upon WordPress, and staff experienced in its design, content development, and maintenance.***

### Operations

All normal and special operations required by the users or administrators must be in the final documentation, including but not limited to:

* periods of interactive operations and periods of unattended operations
* data processing support functions
* backup and recovery operations
* safety considerations and requirements
* disaster recovery and business resumption

## System Interface/Integration

In the final documentation, be specific in every instance where the solution will interface or integrate with anything you as the vendor did not create. URL links to the specifics should be included wherever helpful or applicable.

Also, outline each interface between the solution and the hardware or network components of the system, if applicable. This includes configuration characteristics (e.g., number of ports, instruction sets), what devices are to be supported, and protocols (e.g., signal handshake protocols). This is required if any 3rd party tool, service, or solution is included in the vendor solution in any way.

### Network and Hardware Interfaces

In the final documentation, specify the logical characteristics of each interface between the solution and the hardware or network components of the system, if applicable. This includes configuration characteristics (e.g., number of ports, instruction sets), what devices are to be supported, and protocols (e.g., signal handshake protocols).

### Systems Interfaces

This section will be expanded to explain exactly how the vendor will provide the interface between the website and all other systems. Your expertise and experience will dictate your recommendations here.

For example (replace with exact details):

1. Website to SF interface
2. Website to NPSP interface
3. Website to Stripe payment gateway
4. Website to GA
5. Other?

## Security

### Protection

The vendor must specify what factors, if applicable, will protect the solution (and entire system) from malicious or accidental access, modification, disclosure, destruction, or misuse.

For example (replace with exact details, if applicable):

* encryption
* activity logging, historical data sets
* restrictions on intermodular communications
* data integrity checks
* transaction roll back
* embedded SQL attacks
* how security code updates will be handled
* other?

### Authorization and Authentication

If applicable, specify the Authorization and Authentication factors. Consider using best practice tools, with forward standards if possible. This includes solution login, cookies, SSL, etc.

## Data Management

In the final document, all the requirements for information that is to be mapped over into Salesforce or any other data depository must be clearly documented, including but not limited to:

* types of information used by various functions
* field validation rules
* frequency of use
* data access rules
* data entities and relationships
* integrity constraints
* data retention
* valid range, accuracy, and/or tolerance
* units of measure
* data formats
* default or initial values

## Standards Compliance

* Must meet current HTML5+, CSS3+, PHP8+, SQL, SFAPI, etc. and all other common or popular web/mobile/app standards through FINAL PAYMENT DATE 1.

## Portability

The final documentation must include a section on portability as a requirement, with specific attributes of the system that relate to the ease of installing or migrating the system to other hosting machines and/or operating systems. For example, but not limited to:

* Percentage of components with host-dependent code
* Percentage of solution that is host dependent
* Use of a proven portable solution
* Use of a particular compiler or language subset
* Use of a particular operating system
* The need for environment-independence - the solution MUST operate the same regardless of specific operating systems, networks, development, or production environments.
* Other?

# Supporting Documentation

In order to paint a clearer picture for the vendor, the Center will continue to develop the following documentation during the bidding and design process.

* [Website Strategy Plan](https://ncnonprofits-my.sharepoint.com/:w:/g/personal/ptronnier_ncnonprofits_org/ESyExlSB_g1Lg_shT8A45PQB2lamGn5or_-IP9yBe1JpKg?e=RNLN2i), including Persona details
* User Story – [Start a NP](https://ncnonprofits.sharepoint.com/:w:/g/EVFwpRPmtIJCsSwvCrvTRykBPjIip9Abh__yp8-F2ouf0w?e=z9O9pH)
* User Story – [Public Policy](https://ncnonprofits.sharepoint.com/:w:/g/Ee1tk01JfJNOjXO8ZADI9-MBxr4Ut0CMtfy2oLClKl-NTQ?e=qw3FRT)
* User Story – [Users & Data](https://ncnonprofits.sharepoint.com/:w:/g/EeoAMMTr7ltLscf2hzFplpoB7eB-w_ZYkg8Llcww4VXaUA?e=9ez3rV)
* User Story – [Info Central](https://ncnonprofits.sharepoint.com/:w:/g/EXCjU4gntQxMhwp6BU3ygc4Bq5GrF-GMAbwpOaiotNz8NA?e=nmCLV5)
* User Story – [Job Board](https://ncnonprofits.sharepoint.com/:w:/g/EX9F9l9MT8JIj-VlSLV9XFcB8X3GHQilf9iz9el9ncjkZA?e=7XnWFL)
* User Story – [Events Calendar](https://ncnonprofits.sharepoint.com/:w:/g/EaTuz78qnqRPlWfGDHeWfhgBrAN5PrEvaRPv5IPkeWukcw?e=cuEHVa)

# Deleted or Deferred Requirements

The following requirements have been deleted after approval, or may be delayed until future versions of the system:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| TBD |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

# Critical Dates and Stakeholders

As it’s critical to keep this project on time and under budget, the following table displays WHO the vendor will work with (stakeholders) and WHEN milestones will be completed. All efforts should be made to meet the deadlines:

|  |  |  |
| --- | --- | --- |
| Critical Dates | Stakeholders (name and role) | Comments |
| 11/1/22 | NCCNP Project Team | MUST BE DONE! Current Website Drupal 7 EOL |
| TBD | NCCNP Project Team | Phase II starts |
| TBD | NCCNP Project Team  Selected Vendor | 3-month Post Op ends. “Master Punch List” complete. **FINAL PAYMENT** made.  Maintenance agreement signed. |
| TBD | NCCNP Project Team  Selected Vendor | Solution complete, tested, debugged, documented, and goes **LIVE!** |
| TBD | NCCNP Project Team  Selected Vendor | Reliability, performance, cross device/browser testing, documentation and support benchmarks met. |
| TBD | NCCNP Project Team  Selected Vendor | Finish visitor-facing support materials and staff training on all processes (i.e. handle ‘disruption of service’/’change of system’ experiences from users). |
| TBD | NCCNP Project Team  Selected Vendor | All migrations are complete, tested, verified, and approved by Lynn Brinkley. See Appendix D |
| 2/15/22 | NCCNP Project Team  Selected Vendor | RFQ awarded and accepted by vendor. |
| 2/4/22 | NCCNP Project Team  Potential Vendors | Deadline for all quotes to be submitted. **Note** responsive will be a major selection criterion. |
| 12/1/21 | **NCCNP Project Team includes:**  Paul Tronnier, Technology Director representing NCCNP tech stakeholders.  Lynn Brinkley, Sustainability & Data Manager representing Marketing/Programming, Data Integrity, and Sustainability stakeholders.  Tracy Careyette, Chief Financial Officer representing NCCNP upper management and financial stakeholders.  Rob Madrey, Chief Sustainability Officer, representing NCCNP membership stakeholders.  David Heinen, Vice President for Public Policy and Advocacy representing NCCNP public policy, advocacy, and legal interests.  Lisa Crosslin, Chief Learning Officer representing NCCNP education, events, and services interests.  Rebekah Beck, Education Manager  Sarah Easley, Events Manager | Tech specs finished and RFQ emailed to all vendors. |

### Staff MOCHA Model [Internal Use Only]

**M**ANAGER | Assigns responsibility and holds owner accountable. Makes suggestions, asks hard questions, reviews progress, serves as a resource, and intervenes if the work is off-track.

**O**WNER | Has overall responsibility for the success or failure of the project. Ensures that all the work gets done (directly or with helpers) and that others are involved appropriately. There should only be **one** owner.

**C**ONSULTED | Should be asked for input or needs to be bought in to the project.

**H**ELPER | Assists with or does some of the work.

**A**PPROVER | Signs off on decisions before they’re final. May be the manager, though might also be the executive director, external partner, or board chair.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Manager** | **Owner** | **Consulted** | **Helper(s)** | **Approver** |
| Lynn | Paul | All staff | CM, SE, RB, LCM, JO, BS | CFO/CEO |

**Subject Matter Expertise**

The following staff use the website *every day* as part of their jobs. They therefore have highly valuable insight into the customer base and user behavior. Staff listed in order of length of tenure.

**Caroline:** marketing & content management on the website + writing style/voice of the Center + external communications broadly (programs, events, public policy, MSP, etc.)

**Sarah:** events marketing, calendar, programming, public policy content, IC (archived webinars), building webforms & discounts, etc.

**Lynn:** BF, donors, IC, Pubs, member users/content management, all ecommerce transactions + general website content, users, and data/webform management

**Rebekah:** programs & events, IC, some history with Pubs/jobs board

**Jen:** jobs board customer service

**Leslie:** MA & PBV cases + programs + IC

**Brittany:** membership, Pubs

APPENDIX

1. Definitions, Acronyms, and Abbreviations

\*All terms, acronyms, and abbreviations used in this document are defined within the text content above.

RFQ = Request for Quote

NCCNP or the Center = The North Carolina Center for Nonprofits

NP = Nonprofit organizations in the state of North Carolina

Persona = An important group of website visitors where we can anticipate and meet their specific needs.

Vendor = The final vendor awarded this project

NPSP = Salesforce.org’s Nonprofit Success Pack. The Center uses v

CTA = Call to Action. The main focus of a page, button, etc. indicating what you want the visitor to do next. For example, a JOIN NOW! button on the starting a new nonprofit Landing Page.

LP = Landing Page. A webpage open to the public and designed for a specific persona to visit first. For a Google search for “starting a nonprofit in NC” should land that visitor on our Starting a Nonprofit page, and not the home page.

PPC = Pay Per Click. Online keyword advertising via Google, Bing, etc. where ads display on the top and bottom of search engine results pages based upon advertiser bids.

SEO = Search Engine Optimization. The process of optimizing website content so it can be found using relevant keywords.

WSRP = Website Search Result Pages. Pages and content returned after a search of our website.

SERP = Search Engine Results Pages. Pages and content returned after a keyword search of Google, Bing, or similar search engines.

WP = Welcome Page. The webpage members/sustainers land on after successful login.

LAMP = Linux, Apache, MySQL, and PHP. A platform of free website development solutions typically offered by affordable hosting companies.

CMS = Content Management System. Solutions like WordPress, Drupal, etc. that help streamline website content creation, publishing, updating, and security.

URL = Universal Resource Locator. A website link which when clicked or tapped, opens a new page, video, download, or any other content or resource.

BF = Business Finder. This area includes our vendor, consultant, and partnership directory.

IC = Info Central. This is our library of valuable expertise, insights, and knowledge only available to paid members.

LCC = Legal Compliance Checklist

MSP = Money-Saving Partner

P&P = Principles & Practices

PBV = Pro Bono Volunteer

CBS = Current Business Sustainers

Etc. = Etcetera i.e. All reasonable additions to the list.

SF = Salesforce.org. Our Customer Relationship Management solution.

CRM = Customer Relationship Management. A SaaS solution which tracks interactions with your customer sales cycle, from new accounts, contacts, leads, and opportunities, through sales, support, renewals, and reviews.

MPL = Master Punch List. Similar to a punch list after building a house, this list will include all unresolved issues to be completed by the vendor before final payment.

GA = Google Analytics. Free website visitor tracking solution integrated into the website to provide data for management decisions.

CC = Constant Contact. An email marketing solution used by the Center.

1. Vendor Information, Project References & Quote

Vendor company, contact, and other information, including references, past projects info, links, and materials requested above.

1. Changes POST Contract Signing
2. Migration Tasks, Steps, and Reminders
3. Includes moving Center and paid content from website, plus Salesforce data. Obsolete SF records related to previous website are purged by NCCNP.
4. Provide a detailed migration plan, with final approved by the Center’s Sustainability & Data Manager Lynn Brinkley (LB)
5. Include time to test and confirm all content was migrated correctly, and training to keep content perfect.
6. The FINAL data migration will be verified and approved by LB.
7. Current or better SEO SERP levels must be maintained, including keeping existing URLs and providing 301 permanent retracts for those that must change. The center will provide keyword lists for the vendor’s before and after reports.
8. For quoting purpose, here is a general idea of existing web data which may need to be migrated, with Lynn’s notes:

**Drupal Content Estimates**

|  |  |  |
| --- | --- | --- |
| **Type** | **Qnty** | **Notes** |
| Webpages (currently called "Basic Page") | +50 | some of these might be shed |
| Blog (currently called "Article") | +100 | some of these might be shed |
| Events (populate the calendar) | 50-200 | too much variation by month to accurately count |
| Info Central (currently called "Resource") | 750-800 |  |
| Public Policy | +75 | not sure if David will continue with this content type versus something else |
| Business Finder listings | ~50 | pay-to-publish with expiration dates & user authors |
| Job & Resume Posts | ~150-200 | pay-to-publish with expiration dates & user authors; a lot of variation in quantity of active posts depending on time of year, but probably 200 posts |
| Member profiles | ~1,100 | pay-to-publish with expiration dates & user authors |
| User accounts | ~3,500-5,000 | *active* users/Contacts import from SF (there could be a lot of variation in this) |

*Commerce Related*

|  |  |  |
| --- | --- | --- |
| **Type** | **Qnty** | **Notes** |
| Webforms | +25 | probably would increase drastically if the gated content idea was implemented |
| Webstore products | ~250 | this could vary greatly depending on future user roles and/or clean up |
| Coupon codes/discount logic | ~50 | some of these might be shed |

**Backend Content Types**

* **Images:** This one is tricky. Most staff don't like the stock images used in the hero blocks, and there's no reason to import user-uploaded profile images that have accumulated since 2018. There'd be images from member spotlights, blog posts, BF logos, and various promo/ad-like images used by staff on landing pages for specific products. Obviously our website is not that image heavy--*maybe* 50.
* **PDF/doc files** hosted on server: I can't full put a number on this, perhaps ~100-150. We'd transfer any attachments to current IC resources, our Center Pubs, and attachments for our webpages. Don't transfer pdfs that are not *current* job posts or resumes posts. (These pay-to-publish content types for jobs/BF might be something staff handle ourselves.)
* **Taxonomy lists:** ~8
* **Blocks:** *maybe* 25. (i.e. content areas that are used to display various text ranging from disclaimers to member's-only content on publicly viewable webpages)

**SF objects some of this content would be mapped to:** Accounts, Contacts, Leads, Opportunities, and (hopefully) Cases + Affiliations

1. Stakeholder Comments, Concerns and Feedback
2. As the previous owner of both Affordable Websites and http://ChiefWebOfficerforHire.com, Paul has 20+ years WebDev project bidding experience and recommends the following to keep vendor bids competitive:
   1. ***It’s ok to use professional website templates like*** [***http://templatemonster.com***](http://templatemonster.com)***. Doing so will allow you to meet spec requirements 1, 2, 9, 12, 13, and 15 within hours and under $100.***
   2. Quote more expensive, resource intensive spec requirements like 17 as OPTIONAL, and provide the days and cost figures so the Center can decide if it wants to wait and move it to Phase II. Indicating “ballpark” or TBD is also ok if completing a section is bogging down your bidding process.
   3. Not every WebDev vendor has all resources in-house, and it’s ok to use 3rd parties if you are upfront and transparent. But understand the Center deals only with you, and you must complete all MPL items before payment.
3. Lynn included detailed specifications for remodeling BF, including UX and business model: <https://ncnonprofits.sharepoint.com/:w:/r/_layouts/15/Doc.aspx?sourcedoc=%7B8C286C96-866B-4A25-B0FC-DFEE19142BFB%7D&file=Business%20Finder%20-%20Redesign%20Plan.docx&action=default&mobileredirect=true> <https://ncnonprofits.sharepoint.com/:w:/r/_layouts/15/Doc.aspx?sourcedoc=%7BFB6E389A-238F-46F2-A282-0D1078651869%7D&file=Thoughts%20on%20the%20Business%20Model%20of%20Online%20Directories.docx&action=default&mobileredirect=true>
4. David and Rob suggested this is a good example of Publlic Policy content based upon personas (not design): https://www.councilofnonprofits.org/trends-policy-issues
5. Jeanne likes this site’s use of plus and minus icons to streamline (collapsible) content: <https://utahnonprofits.org/publicpolicy/public-policy-and-advocacy-strategy>