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WWW.NCLM.ORG

December 14, 2009

Dear Prospective Vendor:

The North Carolina League of Municipalities (NCLM) is currently examining its overall communication strategy to better serve its members. This work will involve a comprehensive look at the League's web presence and how to best utilize the latest technology to perform data collection and information dissemination.

NCLM would like to invite you to submit a website redesign & communications proposal by Wednesday, January 6, 2010. Enclosed you will find a scope of work and a list of phased development to help guide your efforts. As you will find, there are two phases to this project. Please include breakdown of proposed costs **with each phase clearly identified**. It is possible that the award of this project may be segmented between the two phases. Proposals should also include bios and professional backgrounds of all staff that will be working on this project including any subcontracting firms that might be utilized.

NCLM's web committee will review proposals the week of January 11, 2010. The top candidates will be invited to make a formal presentation either January 19th or January 20th to the committee. We hope to select and notify a vendor by January 22 with work expected to commence on January 25, 2010.

Please submit proposals via email at rdraughn@ncmlm.org. If you would like to pose questions to the committee, you may also use that address to do so.

Thank you,

Ryan B. Draughn

Chief Information Officer (CIO)
NC League of Municipalities
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Confidentiality Statement

This Request for Proposal (RFP) contains material that is confidential. The recipient shall not disclose any of the information contained in this RFP without previous written approval from NCLM. NCLM specifically requires the recipient not to disclose the contents of this document, or the fact that this RFP has been issued, with any other party other than a representative of NCLM.

If the recipient breaches this non-discuss and non-disclosure requirement, they will be eliminated from the selection process.

Background

Founded in 1908, the North Carolina League of Municipalities is a nonpartisan association of municipalities in North Carolina. The mission of the League is to enhance the quality of life in municipalities through excellent municipal governance. The League carries out this mission by:

1. Providing member services that strengthen and support excellence in municipal government.
2. Engaging members, staff, and stakeholders in representing municipal issues and interests.
3. Developing municipal leaders who can address the needs and interests of their citizens.
4. Providing a unified, nonpartisan voice for municipal issues at the state and federal level.

Services Needed

NCLM intends to incorporate a new website design (<http://www.nclm.org>) as part of a comprehensive strategy to enhance communications between the organization and its members. This will entail providing a structured method of organizing content, utilization of newly acquired online applications (i.e. legislative tracking), “members only” components, robust online forms for data collection, and an examination of how social media applications might be used.

Due to nature of the organization, the site will primarily be driven by the large amount informational content to disseminate to its membership. A successful design should be logical, intuitive, and incorporate the latest techniques and technology to make this information accessible and easy to find. The site should also exemplify the

professionalism and integrity of the organization by presenting information clearly in an elegant, sophisticated, and updated style.

It is expected that the vendor will research peer (and opposition) organization sites to learn how web technology is being utilized. Those insights and suggestions are to be included in the design strategy used by NCLM.

The current NCLM website is a “premier based” solution running on servers owned and housed by the League. As part of the overall strategy, it is expected that this technique will be reviewed and a review of a hosted solution will be examined.

Scope of Work

NCLM seeks professional services for website redesign (Phase I) and a comprehensive communications consultation (Phase II). The overall project is to be logically divided into the specific two phases, though they are not required to be performed consecutively.

During Phase I, the vendor awarded this Contract is expected to:

- Work with League Public Affairs and other staff to develop at least three (3) different prototypes for review by the NCLM Website Committee. The prototypes shall include screen mock-ups with sample content and graphics. After review, the vendor is expected to incorporate any agreed-upon changes and finalize one design for the NCLM website. This process may involve 2-3 iterations to generate final design.
- Work with League staff to build an interior template or sitemap defining the overall architecture of the site. The architecture shall be structured to include current content as well as expected growth in the future.
- Work with League staff to understand goals of new website. Will likely involve some level of stakeholder information gathering (municipal officials, exhibitors, other NCLM staff etc.) to determine how needs will be incorporated.
- Code all elements of the design (CSS, HTML, Flash, etc.) into a fully functional website. Final deliverable by project deadline is operational website with all content from existing site (and any identified new content) uploaded by vendor.
- Work with League staff to transfer content from the existing website to the new site and provide consultation of how this information should be structured.
- Provide a Content Management System (CMS) tool for editing all information on the website and provide recommendations on workflow/approval process.
- Develop “members only” section of website (Access & authentication mechanisms will likely be provided by Microsoft Dynamics CRM system which is currently being used by NCLM).
- Provide training to League staff (~10 staff members) on how to use the CMS tool.
- Incorporate techniques to ensure Search Engine Optimization (SEO) so that members and the general public are driven to the site.
- Provide mechanism for web tracking, usage statistics, and other analytics.

During Phase II, the vendor is expected to:

- Consult with League staff to examine all facets of communications including, but not limited to: email, print, robocalls, website, video, social media, etc.
- Provide marketing expertise on how to best segment membership to selectively target communications.
- Bring fresh ideas and perspectives to the existing League “image” and offer perspectives on how to maximize its value.
- Present strategies to most efficiently deliver and receive information between the League and its members. This may involve a plan to balance the various delivery mechanisms (i.e. print versus electronic delivery).

Logistics

Ongoing discussions between the Vendor and Website Committee will be essential to decide on a given design. The Website Committee will consist of NCLM staff members representing the entire organization. It is expected that most planning and design meetings will be held at the League offices. However, it is understood that it may be pertinent to conduct meetings via conference calls, web-based meeting tools with Vendor facilitating.

The Vendor will design templates to be used by NCLM staff to populate and maintain the website. Although the content types vary, all content will be displayed using a standard set of templates to ensure a uniform look and feel. NCLM may be unique from other clients in that there are staff professionals versed in graphic art and design. We expect that this expertise can be leveraged to create a polished design collaboratively and more quickly than “typical” clients.

Project Deliverables and Parameters

The Vendor will design templates to be used to populate and maintain the NCLM website. In addition, the Vendor will deliver a set of Cascading Style Sheets (CSSs) that implement the selected design. The delivered CSSs will be well-documented, non-proprietary and validated using a W3C CSS validation tool. Further, the CSSs will require the central control of recurring elements.

The proposed website design and all facets therein shall be structured to work seamlessly with the newly acquired membership database application (Microsoft Dynamics CRM v4.x). It is expected that this will play a primary role with “members only” access, but there may exist other components that may need to integrate with the website. It is also possible that NCLM may acquire an email marketing solutions (i.e. Exact Target) which

relates to the communications consultation. All of these possibilities need to be factored into the proposed work.

Vendor will provide a project implementation schedule which detail milestones to complete the project by the deadline. This schedule is expected to be specific, realistic, and allow time for adequate testing.

Website is to include ability to have backup site (or mirrored test environment) for NCLM to perform testing before making changes in production environment.

Phase I: Website Redesign

Number of design templates: 3-5

Number of alternative designs for consideration: 3

Number of Revisions: Up to 3 revisions (once design is selected)

Number of Hours of Facilitated Discussion: 20-25 hours

Number of Hours for Stakeholder Information gathering: 1-2 Hours

Estimated Number of Pages to be transferred to new site: 500 pages

Estimated Number of staff to be trained on CMS: 10 staff

Detailed Statement of Needs

1. System Compatibility

- a. The website must function with similar formatting, performance, and functionality across these browsers (describe any specific functions not supported on specific browsers and systems):
 - i. Microsoft IE 7.x and above
 - ii. Mozilla Firefox 3.x and above
 - iii. Opera 10.x and above.
 - iv. Safari 4.x and above
 - v. Google Chrome
- b. The website must support a screen resolution of 800x600 and above
- c. The website must adjust text sizes gracefully
- d. Web content should be designed to support delivery on mobile devices – including smart phones, tablets, and PDAs.
- e. The NCLM website will likely feature content published in a variety of formats, including,
 - i. Text only
 - ii. HTML
 - iii. XHTML
 - iv. PDF
 - v. Microsoft Office document formats
 - vi. RSS Feeds
 - vii. Possible social media outlets (Twitter, Facebook, etc.)

2. Accessibility

- a. All proposed designs must support pages that are W3C/508 compliant. Additional, all proposed designs must address the following areas:
 - i. For every visual or non-text element there can be a text equivalent.
 - ii. Images can include ALT text.
 - iii. Font sizes are adjustable.
 - iv. Significant interactions have the ability to be completed with both keyboard and mouse.
 - v. Information is not conveyed with color only.
 - vi. Form fields are in a logical tab order, and appropriately labeled for screen reading.
 - viii. All data tables explicitly identify headings for all columns and rows.
 - ix. Meaningful page names and titles for all frames.

3. Administration

- a. Content Management System should provide seamless and powerful environment for content providers. Table creation, rich text, insertion of images must be included and operable for non-technical staff.
 - i. Ideally web-based and non-dependent on client software.
 - ii. Multi-user capable. Ability for multiple users to edit simultaneously.
 - iii. Ideally provide version control.
 - iv. Must be able to backup/restore content/site features.
 - v. Must include structured workflow with approval procedures.
 - vi. Must contain robust security level control with capability to track user changes (audit trails).
- b. Overall site with all content modules must be open in nature whereas integration into NCLM software applications can be achieved.
- c. All content must be stored in a format that can be easily extracted or downloaded by NCLM in the case platform or vendor changes.

Phase II: Comprehensive Communications Consultation

- Number of Hours of “Discovery” of Processes: 15-20 Hours
- Number of Hours of Facilitated Discussion: 25-30 Hours
- Written report and oral presentation detailing process improvements.
- Financial analysis of proposed solutions.
- Marketing and Segmentation Analysis - How to properly segment membership and most effectively target specific groups.
- Implementation strategy listing specific steps to most effectively communicate with membership both short and long term.
- Provide recommendations on how to control external communications. (i.e. authorization, consistency, email “fatigue”, etc.)

Criteria for Evaluating Proposals (In no particular order)

- Quality of plan for implementing design process.
- Projected costs in time, labor and materials for completing this project.
- Recommendations from prior clients (proposal to include appropriate list of references) for whom the vendor has provided similar services.
- Abilities of Vendor to provide adequate staffing to meet project time constraints

Top candidates will be invited to present their proposal to the Website Committee at the NC League of Municipalities Offices in Raleigh, NC on January 19th or 20th, 2010. Each invited vendor will be given one hour to introduce their company, outline their proposal, and answer questions from committee members.



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Schedule

Responses Due from Interested Vendors	January 6, 2010
Responses Reviewed and Top Candidates Selected	Week of January 11, 2010
Vendor Presentations (by invitation)	January 19/20, 2010
Vendor Finalist Selected	January 21, 2010
Contract Finalized	January 25, 2010
Project Start	January 25, 2010
Phase I End	May 7, 2010
Phase II End	June 30, 2010

Contact Information

Please direct all questions concerning this statement of work to:

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Email: rdraughn@nclm.org

All responses are due to Mr. Draughn by close of business on Wednesday, January 6, 2010. Responses via email are preferred.