National Association of State Student Grant and Aid Programs

Request for Proposal:
Website Redesign

Issue Date:	April 3, 2017
Responses Due:	May 10, 2017
Issuing Officer/Contact:	Julie Leeper
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Launch Goal:	October 15, 2017

Introduction/Summary

The National Association of State Student Grant and Aid Programs (NASSGAP) is dedicated to the promotion, strengthening, encouragement and enhancement of high standards in the administration and operation of student grant and aid programs, NASSGAP works to ensure these programs are available to students in all states and to expand and further postsecondary educational opportunities. NASSGAP's membership is drawn from single agencies in each state or territory which are responsible for state-funded student aid programs. The organization's objectives can be found on its website at www.nassgap.org/about.aspx

The purpose of this Request for Proposals (RFP) is to solicit proposals from responsible bidders to provide a redesign of NASSGAP's website at www.nassgap.org. The redesign is intended to allow the organization to better communicate its mission and the impact state-funded student aid has on students and families.

This RFP is designed to provide bidders with the information necessary for the preparation of competitive proposals. The RFP process is for NASSGAP's benefit and is intended to provide NASSGAP with competitive information to assist in the selection process. It is not intended to be comprehensive. Prospective bidders are encouraged to ask questions and to seek clarity. Each bidder is responsible for determining all factors necessary for submission of a comprehensive proposal.

Context

NASSGAP's current website is outdated and needs a fresh look to better serve members and constituents. The website is integral in tracking membership, maintaining historical records, and providing information about programs to assist students and families in paying for postsecondary education. NASSGAP's online presence is the main "face" of the organization as the organization has no physical office location. The website serves as NASSGAP's virtual office and NASSGAP would like to enhance this function.

Prioritized Goals and Functionality Requirements and Services

Mandatory Requirements (pass/fail):

The successful bidder must be prepared to provide a website that:
- Has a responsive layout,
- Allows bidder and NASSGAP's web team to edit key pages, and
- Has a secure log-in area for NASSGAP members.

The updated website must provide the following:

- Public Website/Portal: Serve as the portal through which the public and members receive information about member agencies, organizational goals and objectives, conferences, and research. This includes periodic member generated content such as articles or position papers. NASSGAP wants the ability to "freshen" the content of the home page by periodically uploading new content. The details of this content management system would be an important feature of the bidder's proposal.

- Hosting: The site is currently hosted at Webhost4life.com and must be moved as the host no longer meets the NASSGAP's needs. The new host must be more responsive, offer more features including longer session timeouts and less caching of pages, and provide greater uptime. Any host must support SQL server databases. NASSGAP seeks advice and guidance from the successful bidder regarding hosting of the site. NASSGAP would consider a hosting arrangement with a bidder or a bidder hosting recommendation.

  NASSGAP conducts an annual financial aid program survey with an online survey instrument built in ASP and VBScript that feeds an SQL Server database. The successful bidder would need to support the transition of the website to a new host for both the newly redesigned site and the Annual Survey. NASSGAP would be willing to discuss solutions in which the site was hosted or split-hosted in a non-Windows environment but believes the Annual Survey functionality will require a Windows hosting environment. The Annual Survey web-based data collection runs essentially independently from the main site.

- Membership Management: Incorporate membership information to improve the ease of use and simplify the duties of the Membership Committee. NASSGAP has several levels of membership:
    - Voting membership for a single agency in each state responsible for administering student aid programs. Each

state agency member includes one voting member and any number of non-voting members.
- Associate membership for organizations that do not qualify for voting membership, but which has goals and objectives similar to NASSGAP.
- Fiend of NASSGAP for designated individuals.

Detailed information about DRAFT membership requirements is attached as Attachment 1 and includes the following:
- ➢ Provide online means for administering and maintaining membership information including:
  - Listserv or other electronic mailing list service to allow for communication among member agencies. NASSGAP currently uses a Listserv hosted by a member agency. There is no communication or overlap between the Listserv and the website with regard to member contact information or member details. The current website, although it serves as a virtual office, has no capacity for membership management such as dues reminders, maintaining an accurate list of current members, and managing member communications. A solution in which membership details (including categories of membership – voting, associate, etc.), contact details, mailings and other such items could be handled in an integrated fashion from one site is desired.
  - List of member agencies and information about those agencies.
  - Membership management including allowing the Membership Committee and Treasurer to track membership and communicate about paid or unpaid memberships. A solution in which changes made by the Treasurer could be seen and acted upon by the Membership Chair (and vice versa) is desired. Some additional information on this subject is provided in Attachment 1; however bidders are encouraged to ask questions on this subject.
  - Executive Committee members often need different levels of access to the website than other NASSGAP members. The membership site must accommodate specific levels of access based on membership needs as determined by the Executive Committee.

- Registration System: Provide a conference registration system which interacts with the membership management system.

4

- Treasurer Management: Provide online management of Treasurer's duties and records. NASSGAP is open to the idea of using existing tools like Google Sheets. A solution in which Google Sheets or something similar would be used by the Treasurer to complete the budgeting and fiscal management of the Organization which could then serve to echo parts of that work to the website is desirable.

- Virtual Office and Historical Repository: Serve as NASSGAP's virtual office and historical repository including:
    - Upgrading the way archives are updated, maintained, and stored including the possibility of a drag and drop interface for organizing online files, and
    - Ensuring transfer and/or maintenance of all documents currently housed in the virtual office/repository.
    - Executive Committee members often need different levels of authority to access information.

- Research: Provide research information to membership and nationwide researchers. NASSGAP needs the ability to add links to the website and research documents.

- Member Polls: NASSGAP currently has poll functionality on the site used to query member opinions on subjects of interest. NASSGAP would like to update the structure of these polls to make it easier to create, date, search, disseminate, and maintain information including.
    - Provide access only to authorized members of NASSGAP with log-in credentials.
    - Provide ability for all authorized members to create and answer polls, search polls by topic, and create reports.
    - Allow members to submit written comments in addition to selecting single or multiple provided answers.
    - Automatically compile reports and provide a list of answers by individual members as well as reports which remove information concerning the member responding to the poll.

- Training: The successful bidder must be prepared to train and provide ongoing technical support for the website to NASSGAP's web team particularly on issues specific to the architecture, structure and construction of any proposed site. The person currently managing the NASSGAP website can edit pages, FTP changes, and update/write code, but would need initial guidance on new or changed features of the site.

The updated website may also include features such as:
- An events calendar,
- Integration with social media (sharing pages, embedded social feeds), and
- Blog capability.

NASSGAP would consider giving temporary website credentials to responsible bidders seeking to look at the current functionality and structure of the site in more detail.

NASSGAP would allow the successful bidder to retain ownership and rights if entitled to any code used in developing the site but would need an unfettered license to use such code on its site (not to sell or profit from it) in perpetuity. If third party tools or open source tools are used for content management or mailing solutions, NASSGAP would need to understand the licensing and usage arrangements of such code and would look to the bidder to provide that guidance and understanding.

Issuing Officer

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Users

NASSGAP Members – Members use the website to obtain information about membership, colleagues, research, post and respond to member polls, and maintain/view historical information.

NASSGAP Officers – NASSGAP's Executive Committee members use the website to conduct the business of the organization and keep the information up to date for general members.

Researchers – NASSGAP's Annual Survey is highly respected and often accessed from the organization's website.

Decision Makers – The website could be a valuable tool for Congress, State Legislatures, and others who influence policy concerning student financial aid.

RFP Timeline

RFP Issue Date: April 3, 2017
Bidder Questions Due: April 14, 2017
*NASSGAP Responses to Questions: April 24, 2017
RFPs Due: May 10, 2017
NASSGAP/Bidder Discussions: May 17, 2017
Winner Selected & Contacted: May 22, 2017
Contract Finalized: June 15, 2017
Website Goes Live Goal: October 15, 2017

*Bidders are invited to submit written questions and requests for clarification regarding the RFP. Answers to all questions will be posted on the NASSGAP website on April 24, 2017, to ensure that all bidders have full information concerning this RFP.

Project Launch

NASSGAP would like the new website to be live by **October 15, 2017**. NASSGAP's annual conference is scheduled for October 24 through 27, 2017, and the new website is scheduled to be unveiled during the conference. However, bidders may recommend timetables that would allow for alternative release options.

Cost Proposals

NASSGAP anticipates a multi-year partnership with the selected company. The first year will include the redesign of the website and subsequent years will include maintenance and updates. Line-item pricing must be provided individually in each of the following areas:

- Initial-year redesign implementation including each of the items included in the "Prioritized Goals and Functionality Requirements and Services" section of this Request for Proposals.

- Annual maintenance and/or hosting. If bidder will not host the site, NASSGAP would require a hosting recommendation and projected hosting costs.

- Annual number of hours of free customized bidder-provided technical service (if any) and hourly cost of work after those hours are used.

Cost proposals must include Firm Proposal Terms -- the minimum number of days following the deadline for submitting proposals that the bidder guarantees all proposed terms, including price, will remain firm is 90 days.

If NASSGAP determines that it is unable to fund all of these items in the initial year, it reserves the option to negotiate with the bidder the completion of only those items NASSGAP can fund in the initial year and postponing negotiations on the remaining items.

Proposal Requirements

Bidders must submit their proposals electronically and in hard copy to the Issuing Officer.

Bidders must include the following in proposal responses:

- Bidder's company description including the year the company was established, a brief company history (including expertise in website development) and number of full-time staff members.
- Project process overview.
- Proposed timeline.
- Team biographies including team member roles and experience and resumes or background descriptions of all key personnel who will be assigned to this project.
- Three recent relevant project samples including URLs or links to websites that can be viewed to demonstrate the company's experience.
- Three client references with contact names and telephone numbers
- Initial-year redesign implementation costs.
- Annual maintenance and hosting or projected hosting costs.
- Potential hardware and/or software requirements.
- Website development technology to be used.
- Terms and conditions required by the bidder from NASSGAP.

- Contract requirements/draft contract.
- Detailed project timeline.
- The bidder must provide the following information for the past five years:
  - Has the bidder had a contract for goods and/or services terminated for any reason? If so, provide full details regarding the termination.
  - Describe any order, judgment or decree of any Federal or State authority barring, suspending or otherwise limiting the right of the bidder to engage in any business, practice or activity.
  - Provide a list and summary of all litigation or threatened litigation, administrative or regulatory proceedings, or similar matters to which the bidder or its officers have been a party.
- Assurance that any and all data uploaded to and generated within the website by NASSGAP remains the property of NASSGAP in the event of contract dissolution.

The successful bidder on this proposal must:

- Show evidence of at least four years of experience,
- Demonstrate that it has produced a minimum of five websites,
- Demonstrate that it has worked with at least three clients similar in size to NASSGAP, and
- Provide demonstrated expertise in art direction, writing, programming, systems administration and database design.

The successful bidder must be able to work closely with NASSGAP's designated website representatives on a continuing basis.

The Issuing Officer identified in the RFP cover sheet is the initial point of contact regarding the RFP from the date of issuance until the Notice of Intent to Award the contract is issued.

Contract

The National Association of State Scholarship Grant and Aid Programs reserves the right to reject any or all proposals received in response to this RFP at any time prior to the execution of a contract. Issuance of this RFP in no way constitutes a commitment by NASSGAP to award a contract.

The contract that NASSGAP expects to award as a result of this RFP shall comprise the specifications, terms and conditions of the RFP, written clarifications or changes made in accordance with the provisions of the RFP, the offer of the successful bidder contained in its proposal, and any other terms deemed necessary by NASSGAP.

The term of the contract will begin on the date on which a contract is signed and will be in effect for one year from that date. NASSGAP seeks an ongoing relationship with the successful bidder and will consider annually renewing the contract.

NASSGAP WEBSITE

Membership Administration

Membership Area Requirements:

View and Change Agency Paid Status – to #2

View Paid Status Screen example:

Agency	2014	2015	2016	2017	2018
Alabama	X	X			
Alaska	X	X	X		
Arizona		X			
California	X	X	X	X	X
All States…..					

Edit Paid Status – to #3

Years displayed could be 3 before and 3 after current year as in example – would also want to be able to view all historical information.

Edit Paid Status takes user to essentially an editable version at this screen with boxes to check and uncheck

Data for this built from #2A:

Payment Notice Table example -- #2A

Agency ID	
Year	Date
Paid	Y/N
Notice Date	Date
Notice Type	Text

AgencyID	Year	Paid	Notice Date	Notice Type
13	2015	X		
13	2016	X		
13	2017		9/1/2016	First
13	2017		11/9/2016	Second
287	2016		4/1/2015	First
287	2016		6/1/2015	Special

12	2015		5/2/2014	Final
12	2015	X		
12	2016		4/1/15	First
12	2016	X		
12	2017		9/1/2016	First
287	2016	X		
13	2017	X		

Edit Paid Status Screen example -- #3

Agency   Selected Years

     2014   2015   2016   2017   2018   2019   2020

     ☐   ☐   ☐   ☐   ☐   ☐   ☐

When Treasurer receives a check for dues from agency XYZ, Treasurer can come to this screen, find the agency, find the year, and check the box to indicate paid status.

Treasurer would need to be able to generate a paid status report for a given year. An area with a dropdown and a button might work:

Select Year: 2014   Generate Paid Status Report -- #3A
               2015
               2016
               2017

Paid Status Report -- #3A

- Paid Status Report would need to be Excel exportable. Maybe the result comes up on a screen with an option to export to Excel or maybe the report opens directly as Excel.

- Edit screens are separated from view screens only because an edit screen can make someone who only wants to view data nervous and it can help with understanding. These may be able to be combined.

Manage Agency Membership Renewals – to #4

- Want tools so Membership Chair can see what has already been sent and decide to send a notice to a member or selected group of members.

View Agency Notices Sent -- #5

Select Year: 2014   ☐ Show All
2015
2016   ☐ Show Only Unpaid for Selected
Year

2017

Agency	Notice Date	Notice Type
Alabama	6/1/2016	First
Alabama	7/2/2016	Second
Alabama	8/3/2016	Third
California	6/1/2016	First
Mississippi	6/1/2016	First
Mississippi	7/15/2016	Special

Send Agency Membership Notices -- #6

Select Year: 2015   Select Agency: Alabama
2016   California
2017   Kentucky
2018   Iowa
Wyoming

Note: Above would need to include Membership
Chair copy as a choice

Send -- #9

Enter Notice Text:

     Go to www.NASSGAP.org/Membership
     To Renew your Membership now!

Enter Notice Note:

     First, second, special, etc.

- Select State allows for multiple discontinuous selections.

- Notice is sent to voting member address for each agency. Will need to be an entry for each agency. Populates from existing agency database.

- Notice text is whatever is entered. Becomes body o f email -- #6A

#6A: A serious issue with a sending page is email bounces and non delivery.

If "From" address was NASSGAP-Membership-Chair (for example) there would need to be a mechanism to allow bounces or non delivery notifications to go to Membership Chair. Also needs to be a way to handle people replying to the email address used. Membership@NASSGAP.org could be created and used.

Manage Individual Member Details – to #7

- Treasurer needs a place to record payment status by agency and year.

- Membership Chair needs tools to manage agency renewals and review individual member information.

#7A: Filter to Show

	Only Voting
	Only Full Member Agencies
	Only Listserv
	Only Listed on Website

#7B

State	Agency	Member	Voting	Associate	Website	Listserv
Maine	FAME	Claude	X		X	X
Maine	GBPI	Mike		X	X	X
Louisiana	LOSFA	Melanie				
Louisiana	LOSFA	Susan	X		X	
California	CSFA	Cheryl				X
Illinois	ISAC	Eric	X		X	
Illinois	ISAC	Mike				X

+User email as a field

#8   Edit this Information   Export as Excel
- Clickable to sort by each heading
- Or live per record

#7A
- Voting would be determined by Y/N on voting field in users table.
- Associate would be determined by content of agency type field in agency table.
- Listserv would be determined by Y/N on listserv field in users table.
- Shown on website would be determined by Y/N in active field in users table.

#7B
- When creating a new member using the existing process if the "use agency address" dropdown is selected, the state field in the member record of the users table is not populated. There are valid users with no state in the user table. The

14

state designation for each member may need to come from state of the agency they are associated with in the agency table.

#8 – Edit Individual Member Information
- Same as view member information but checkable boxes to edit.

- Need to be able to turn John Doe from XYZ agency into a voting or listserv member based on received information.

- Again, Edit is separate from View only as a design choice.

#9:
- People receiving a membership renewal notice would be instructed to go to a web address to enter information in order to generate a membership invoice.

- The information Collector Screen -- #10 will need to be behind a login – it can't just be open to the public. This means there will need to be "dummy" inactive voting member records for states like AR, DE, HA, NH, OH, WI, and WY that can be activated as needed so those states can use the renewal/joining process.

#10

Renewal/Join Data Collection Screen -- #10

Please Select Your Agency: Illinois Student Assistance
                                     Mississippi Financial Aid
                                     Montana Office of Financial Aid
                                     New Jersey Higher Education

Please Review Information for each agency member to make sure it is correct:

Name
Title   Correct
Address, Etc   Edit
Phone   Fax   Delete
Email   Voting Member
                                                         Be on Listserv
                    Add New Member

- Repeating box prepopulated as many times as needed based on agency selected in dropdown.
- The voting member must be designated before invoice generated.

#10A

Year Renewing for: 2016
                     2017
                     2018
Current year is _____

Send Payment to:
        NASSGAP Treasurer
        Address
        City, State ZIP

Invoice will be sent to the agency's voting member.

| Generate Invoice -- #12 |

- Year dropdown could be populated by current year minus one through current year plus two or by some other method.

- Current year is just calendar year.

- NASSGAP Treasurer name and address can be hard coded and manually changed.

#10B:
- Data from collection screen is coming from the user table and changes made are going directly back into the user table. This may mean there needs to be some screening, an approval process, or a change log to help track what occurs.

- The generate invoice button could require a "correct" check for each member listed on the screen before allowing user to proceed.

#11:
- Idea would be to use the current user table in the database as the universal people list – all website people, all listserv people. Inactive users cannot log-in to the website.

- Member: Active=1 Agency ID is not null
- Listserv Member: Listserv=1

- Use the existing "add member" process to be able to add members of all types; active/inactive, listserv Y/N.

- A member from an inactive unpaid agency like Hawaii would need to be entered as inactive but as a voting member so they would populate the membership renewal screens.

#11A:

- Member record would need a new "listserv" Y/N field. Not null. Not exclusive – can be a listserv member independent of status of any other member or field.

- Member record would need a new "voting" Y/N field. Data integrity is an issue here. There can be only one voting member per agency. Enforcing this automatically through all the various interfaces may be too difficult – this may need to be a periodic manual check.

#11B:

- In the current directory, the option for the unlogged-in public to see inactive members should be removed.

- In the logged-in version of the directory, the member record should display:

Voting		Checked or not
On Listserv		Checked or not

- Voting and listserv would need to be fields changeable in the member record modified by the existing directory interface.

#12: Generate Invoice:

- Invoice would be a user supplied email body sent to the voting member email address for a renewing agency.

- May need a screen to enter/edit invoice text or a place to upload pre-entered text.

- Would need to be able to handle non-deliveries just like renewal notifications.