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Request for Proposals – Organizational Website

Organizational Background/Overview

Elder Law & Advocacy (ELA) is a caring group of experienced elder law staff and trained volunteers in San Diego and Imperial Counties. We provide free and low-cost civil legal services to over 8,000 seniors annually, assisting both rural and urban seniors in the Southern California region through a unique community-based delivery system. We are adopting and developing technology that enables us to reach seniors wherever they are located. Our attorneys, staff and volunteers aid seniors at senior centers, nutrition sites, senior living complexes, mobile home parks, nursing homes, hospitals, and their residences.

Project Overview

ELA seeks to replace its current organizational website, and more broadly we view this project as a re-imagining of our online presence, including our social media strategy. ELA is therefore soliciting proposals from qualified vendors to provide website design and development services on a project basis as well as long-term ongoing hosting and support for the new system. The objective of the website is to improve communication and service delivery to clients, donors, volunteers, partner organizations, government agencies, attorneys, and the public.

Project Need

A sophisticated, robust, and content-rich website is critical to our mission and service delivery model. While our current website at <http://seniorlaw-sd.org/> already satisfies many of our needs, there are also gaps that it does not fill. While some written content and copy may be moved over to the next site, we are mostly looking to “start fresh” with a new site that is more modern and visually-attractive in appearance, supports additional features not currently supported, is more accessible to persons with disabilities, and aligns more closely with our appetite for future technological innovations.

Project Scope and Deliverables

Site Features and Characteristics

- Based on a widely-used, industry-standard content management platform (e.g., WordPress, Drupal, Wix, etc)
- Multilanguage Support that goes beyond automated translation and allows for human curation of content (e.g., Wordpress WPML or Polylang plugins or equivalent for other platforms)
- Advanced information security protections (e.g., Wordpress Wordfence, Drupal Steward, other WAF)
- Backup and version history to allow rollback in case of unintentional changes or other system/content availability issues
- Website platform supports a rich ecosystem of third-party features
- Site is fully navigable with assistive technology (screenreaders, keyboard and alternative human input devices) and vendor is able to provide consultative support on accessibility considerations during the site design and build-out process
- Website platform and vendor's management and support models are both supportive of third-party developers. We want to avoid "lock in" or "gatekeeping" if we choose to engage with a third-party service or developer to assist us with enhancing website functionality and future innovation.
- The backend should be tidy, intuitive, and easy to navigate allowing in-house staff to create and update content in a point-and-click manner without knowledge of HTML.
- Site should load quickly and vendor should have experience with using page load optimization tools and services such as Google PageSpeed Insights.
- Larger font size by default compared to our current site and the ability for users to adjust font size, potentially with an accessibility widget like <https://maxaccess.io>
- Private counselor login area for HICAP counselors.
- The ability to track website use and visits (e.g., using Google Analytics or other approaches).

Vendor Support & Management Model

- Strong co-management model of support. We want to have full administrative access to make changes, but we also want to be able to rely on the vendor for help making changes when needed.
- Ability for in-house staff to create and update content and navigation structure in a point-and-click manner without knowledge of HTML
- Ability to provide insights and guidance on content strategy, including blog and social media strategy
- Understanding of California website privacy / TOS requirements for websites
- Can assist with setup and interpretation of engagement tracking systems (e.g., Google Analytics)

- Experience with ADA / WCAG / Section 508 Compliance. Testing and confirmation of WCAG compliance should be a part of the proposed project development plan.
- Ability to help us select and install some common "off the shelf" plugins or features, e.g., Calendly for scheduling

Integration Capabilities

Note: ELA anticipates that development of multi-media content, online intake systems, legal triage, chatbots, self-help forms, etc, as listed below, to be outside of the scope of this website project. However, we want to ensure that the system and vendor we select will be able to work easily and efficiently to integrate such content and systems with our website in the future. It is imperative that neither the website platform selected nor the vendor's approach to management and support be an obstacle to future innovation initiatives.

- Online intake / application forms
- Fillable forms and templates
- Legal triage / individual assessments
- Links to partner organizations
- Embedding of multimedia content within pages and posts (videos, etc.)
- Ability to easily embed livechat or chatbot widgets site-wide through addition of code snippets to the sitewide footer or a similar approach
- Newsletter signup (MailChimp newsletter signup is integrated into our current website but we are open to switching platforms).
- Links to social media, potential to embed Twitter feed

Aesthetics

Note: ELA understands that brand identity / logo design services are often separate from web design services. We are open to proposals from web design companies that can provide both services, but also welcome referrals to other partner vendors that can provide logo design and brand identity services if your company cannot provide both.

- Up to date and modern in appearance
- Updated color scheme and logo
- Updated photos
- Visually attractive on various screen sizes, including mobile, tablet, and desktop
- Layout and design should be determined in a collaborative manner with ELA to provide a high-quality user experience.

Social Media Strategy Services

- Assistance with setup of additional social media platforms, and integration with our website. Currently we have Twitter, Facebook and LinkedIn presences, with automated posts configured. Expansion might include TikTok, Instagram, YouTube, etc.
- Beyond simply making sure social media accounts are set up and functional, we are also interested in vendors who can help us reimagine and optimize our social media activities.

Content Areas

Note: ELA wishes to engage in a collaborative process with the selected vendor to determine appropriate strategy for site structure, navigation, and content. The items below reflect our current vision, which may evolve as we work with you and incorporate your guidance and expertise.

- Attorney/Staff Profile area
- Financials (IRS 990, audits, annual reports) area
- Blog
- Educational Resource area
- About Organization / Who We Are
- Acknowledgement of Funders (Edit #8)
- Partner Organizations list (with links) (Edit #8)
- News & Events
- Programs / How We Help
- Donation / Fundraising Information
- Get Help with a Legal Issue/Get Help with a Medicare Issue
- Contact area

Copywriting Services

We anticipate that much of our website content will be able to be moved over without significant editing, and/or that new content will be within our comfort level to author on our own. However, depending on cost we are also open to proposals which include assistance with writing new content for the new website, especially if your company has significant experience and expertise with content development and messaging. If copywriting is a service your company is able to provide, provision of information about typical rates for this service is welcome.

Budget

The maximum amount allocated for one-time project costs associated with this project is \$50,000.

Project Timeline and Proposal Review Process

It is ELA's intent to have open and communicative interactions with vendors who are interested in submitting proposals and who feel their services are a good match for ELA's needs.

At any time between issuance of this RFP and the RFP deadline of August 26th, vendors may schedule a time to talk with ELA's procurement consultant, Alex Clark of Clark Management Consulting, to ask questions about the RFP and Elder Law & Advocacy's business needs and challenges. These would be informal conversations, the purpose of which is to help vendors understand ELA's needs and objectives before vendors invest significant time into proposal

development and demos. Clark Management Consulting does not have authority to make any agreements or authoritative representations on behalf of ELA, and these calls are informational only. These calls can be scheduled directly with Alex Clark through <https://calendly.com/cmcalex/15min>. Vendors are also welcome to submit questions informally via email to alex@clarkmanagementconsulting.com.

ELA requests that all interested parties submit a proposal by **Friday, August 26th, 2022**, via email to our procurement consultant, alex@clarkmanagementconsulting.com. Alex will confirm receipt of all proposal submissions upon receipt. If your company does not receive a confirmation within 24 hours, please call Alex Clark at (402) 960-1718.

ELA will not pay any contractor costs associated with preparing responses or proposals submitted in response to this RFP.

ELA's website committee and procurement consultant will review submitted proposals and may invite some vendors to schedule product demos or presentations as vendor and committee schedules allow.

ELA intends to select and engage a vendor by September 9th. Selected vendors should be prepared to begin work soon after selection. Project completion, including launch of the finished site must occur no later than December 31st, 2022.

RFP Issuance and Informal Question Period Opens:	July 25 th , 2022
Deadline for Responses:	August 26 th , 2022
Contract with Vendor Signed & Project Initiation:	September 9 th , 2022
Website Launch & Project Conclusion Deadline:	December 31 st , 2022

Submission Requirements

All responses should be concise and well-organized, and demonstrate how your proposed services, approach and methodology, experience, and terms can meet or exceed Elder Legal Aid's requirements.

All proposals must also contain the following for each vendor:

Vendor Information

- Vendor's full name, address, telephone number, email, and website
- Your submission point-person. Please include title, phone number, and email address.
- Company overview information, such as a brief history, mission, number of employees, number of years in operation, etc.
- List at least two websites your firm has produced that reflect your work and relevancy to this project.

- Three (3) recent references concerning your experience with the work described in this RFP. Indicate the reference’s name, title, telephone number, email address, and a brief description of the services provided.

Project Summary

A summary of your understanding and approach to the project.

Proposed project timeline.

A detailed timeline of anticipated project activities and phases.

Pricing and Pricing Methodology

We are asking for enough information about pricing and costs to get a general sense of all costs involved and to support best value determinations between vendors. Accordingly, vendor proposals should include the following pricing information and components:

- Pricing of one-time project costs whether payable to the vendor or to a third party.
- Ongoing, long-term costs for system hosting, maintenance and support, whether payable to the vendor or a third party.
- Optionally, vendors may choose to include multiple pricing “options” or “tiers” for components of their proposal if they feel it would be helpful to ELA’s decision-making process

Other Information

Applicants are encouraged to provide other information or material that they believe is relevant to ELA’s evaluation or that provide additional features or value to ELA.

Some examples of additional value information may be:

- Experience working with civil legal aid organizations
- Capacity for and experience with significant and novel innovation in web-based delivery of legal services
- Compatibility with third-party systems

Evaluation

The contract will be awarded to the vendor who provides the best value – the most advantageous balance of price, quality, performance, and professionalism – to ELA. Proposals will be evaluated based on the following criteria:

Price

- The reasonableness of the price for the service being provided

- Whether the price is realistic, reflects a clear understanding of ELA's need, and is consistent with other parts of the proposal

Quality

- Qualifications and experience of company
- Technical expertise and approach
- Level of response detail

Performance

- Features and capabilities, including support for integration with third-party systems
- Understanding of and ability to meet ELA's needs
- Responsiveness to ELA

Professionalism

- Quality of references
- Reputation for excellence in price, performance, quality, and service

Elder Law & Advocacy's Rights:

ELA reserves the right to:

- Conduct discussions with respondents and accept revisions of proposals after the closing date;
- Make an award based upon various selection criteria;
- Request clarification from any respondents on any or all aspects of their proposals;
- Cancel or re-issue this RFP at any time;
- Retain all proposals submitted in response to this RFP; and/or
- Invite some, all, or none of the respondents for interviews, demonstrations, presentations and further discussion.

Elder Law & Advocacy's Assurances to Vendors:

- ELA is issuing this Request for Proposals in good faith, with intention to evaluate all proposals received with sincerity. ELA does not at this time have any pre-chosen vendor in mind for this project.
- While ELA will not provide feedback to non-selected vendors regarding why they were not selected or how to improve their proposals in the future, ELA will inform non-selected vendors that they were not selected as soon as a decision is made.