Request for Proposal (RFP)
Website Re-Design

Issued: July 20, 2021

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Introduction

About The Salt Spring Centre of Yoga

The Salt Spring Centre of Yoga (SSCY) is a small, non-profit spiritual retreat centre located in the heart of Salt Spring Island. The Centre was established in 1981 by the Dharma Sara Satsang Society (est. 1974); a group of students studying under master yogi Baba Hari Dass, known affectionately as "Babaji." The Centre is dedicated to preserving his teachings and promoting this knowledge to the world.

We are a spiritual community dedicated to the principles and practices of Classical Ashtanga Yoga. We aspire to create an environment for the attainment of peace in everything we do.

Our Core Values:

Profound Practice: the transformative power of classical yoga practices, by sharing and supporting these and other contemplative practices.

Right Relationship: harmony and integrity in all our relations with one another and the land, as guided by the Yamas and Niyamas of Patanjali's Yoga Sutras.

Selfless Service: living, working, and playing in the world, developing positive qualities, and reducing attachment as a path to peace, and providing opportunities for service to others and the world.

The Centre currently sustains itself primarily through donations and fee for service activities (classes, workshops, rentals, retreats and educational programs).

Purpose & Scope

The Salt Spring Centre of Yoga (SSCY) has initiated a Request for Proposal (RFP) process to identify a vendor qualified to plan, execute, and deliver the redesign and ongoing maintenance of the Centre's website (www.saltspringcentre.com).

SSCY requires a vendor who has demonstrated experience in managing website projects and expertise with best practices regarding successful website architecture, design, development, deployment, optimization, and maintenance.

Confidentiality Statement

The Proponent shall keep The Salt Spring Centre of Yoga's data confidential and shall not disclose its content to any other party, other than to those internal employees or agents responsible for preparing a submission, without the prior written approval of the Salt Spring Centre of Yoga.

Environmental Overview

Background

The SSCY has traditionally been run by a large volunteer base and small staff team – including its IT infrastructure, website, communication, and productivity tools. SSCY technical architecture could be described as a collection of free or low-cost applications with uneven application of procedures and policies and many manual integration points. Over the year's volunteers have opened various personal or saltspringcentre free accounts to meet marketing, communication, and productivity needs. There is a proliferation of 'free' accounts on dozens of apps. We have no dedicated IT staff. In 2019 we undertook a process to review, consolidate, and standardize the Organization's systems, applications, tools, and processes. We are in process and our current (essential) web techstack consists of:

- Retreat Guru (Cloud) retreat booking system to advertise, register, book and manage online and in-person retreats and events. Retreat Guru contains it's own set of integrations to external apps.
- Thinkific! (Cloud) Learning Management Systems to advertise, organize, register, pay for, administer and manage online workshops, courses, and programs including (Yoga Teacher Training, Volunteer Karma Yoga Programming) and other free and paid online programming. This system contains it's own integrations or potential integrations with CRM, Marketing, Payment and Sales Systems. It is not currently integrated with the Centre website.
- Zoom (currently manual integration) will be provided through Thinkific!

The current WordPress website was designed and implemented in 2016. There is no dedicated web administrator. Without consistent oversight, over-time the site has become highly customized with many manual integrations, inconsistent release strategies, or page formatting requirements. It is supported by volunteer / best efforts basis with respect to regular software updates, integrations, page optimization and general maintenance. As a result, finding, navigating, and completing a call to action can require several manual steps across multiple platforms – either by the User, Web Admin, or Program / Course Managers.

The site currently receives approximately 1,800 unique visitors per month. We are unable to benchmark key performance indicators. The site is currently hosted on a private server through HostXNow. Current key site integrations are:

- Social Media (Facebook / Instagram /Youtube)
- MailChimp
- Retreat Guru
- Thinkific! (Pending)

While there are many active plugins for the website, we expect these would be reviewed as part of the website redesign.

Scope

1. Online Environment and Website Redesign.
2. Testing
3. Post Go Live / Cutover Support
4. On-going website / environment maintenance.

Goals
- Create excellent User Experiences based on UX / UI best practices in the yoga and spiritual retreat industry.
- Improve operation efficiency by standardizing and automating administrative and maintenance processes.
- Reduce site downtime, admin errors, page errors and page maintenance.
- Increase site traffic and user conversion rates.
- Implement affordable solutions that are scalable as the Organization grows.
- Integrate easily with best in class, affordable, turn-key solutions (e.g. Retreat Guru, Thinkific! CRM, and other future systems) to meet our Communication, Outreach (including donors), Sales, and Marketing needs

1. Online Environment and Website Redesign

We desire an individual or firm that will deliver not only a visual refresh to the site but expertise on best practices and usability surrounding architecture and navigation. In addition, the refresh will maximize and promote customer engagement (UX/UI).

The Salt Spring Centre of Yoga's website is an integral component of its presence and marketing strategy, and target demographic markets (North America, Central Europe and Australia) use the Internet as a primary source of information about finding quality yoga programs, retreats, and work-exchange opportunities. As the Centre seeks to grow its user base, the site design, reliability and usability become increasingly critical.

In particular, the site must be designed and built responsively to assure visitors can view content from any type of device. Visual re-design of the site must be coordinated to create a cohesive message and to invite engagement. An information architect is necessary to re-organize content to be easily accessible and inviting to users.

According to www.speedtest.net on July 14, 2021 at 1:45 pm was:

PING: 10

Download: 256.98 mbps

Upload: 32.19 mbps

This speed test was completed on a hardwired computer in the Centre's physical office space.

Identified Redesign Requirements

Requirements that are not essential for go live are indicated as 'nice to have'. If you feel that something has been missed or could be rolled out at a later date please state this in your proposal.

Architecture
- Assess, identify, document, and implement a coherent and integrated *application architecture*.
- Recommend a development approach (e.g. mobile first, other) based on current trends in our sector.
- Research and recommend a WordPress site specific webhost that provide excellent value for service. (See IT Support and Maintenance section below).
- Research and recommend a stable WordPress site template.

- Simplify existing navigation and processes (e.g. program offerings, news letter sign-up, donations, contact).
- Configure and manage saltspringcentre.com emails.
- Identify, configure, and apply appropriate plugins and integrations (including Retreat Guru, Thinkific!, Mail Chimp, Face Book, Instagram, possibly Salt Spring Youtube Channel).
- A staging area for testing new functions / pages. (nice to have)

User Experience

The following items are organized in priority order.

- Identify required pages, create menu structure, and branded page / post templates.
- Create appealing, relevant, and optimized visuals that are fresh, accessible and modern.
- Choose and implement tools and processes that drive traffic to website, improve user engagement, and yield high conversion rates (Important)
- Enable users to easily sign up, register, pay and engage in all programs.
- Transparent delivery of materials across integrated systems (Retreat Guru-Thinkific!).
- Build in the ability to provide an online store.

Note: SSCY will provide a copy of our current brand standards. We are open to refreshing our brand standards as long as the changes support one or more improvements (e.g. UX, load times, SEO, etc.). Creation of an online brand standard document would be a great optional component. Please quote this as a separate category.

Security and Privacy

Security and Privacy are critical for all pages in the go live delivery.

- Set up website security profiles by role (e.g. admin, editor, paid user, free content).
- Apply security measures including anti-bot filters (e.g. CAPTCHA, reCAPTCHA).
- Comply with relevant Privacy laws (GDRP, CPPP, and PIPEDA. Also include HIPPA, PHIPA, etc. as applicable).
- Social Media integration at the page level (e.g. Facebook, Instagram, other as identified).
- SEO configuration and optimization including keywords, metadata, and page load times (as per Google's new guidelines).
- Harmonize domains and document renewals.

API Design and Build

Our current environment does not allow for standard page integrations with Retreat Guru. Thinkific! is a new application for the Centre and is not currently integrated with our website. An API between Retreat Guru and Thinkific! may be required, in the longer term to facilitate seamless administration, delivery, tracking, reporting and business planning for online and hybrid programs. The new website design must deliver:

- Retreat Guru and Thinkific! page integration with the website structure are critical for initial go live.
- Identify all business critical integrations such as CRM (Donor) (whether out of the box or custom build) based on critical business functions in the short (for go live)

Additional integrations need to be assessed and implemented over time.

- Retreat Guru - Thinkific! API based on functional requirements
- Identify any integration or custom API's for medium term (next 3-6 months)

Analytics and Reporting
- Identify, configure, and apply relevant analytics for benchmarking and on-going reporting including: traffic, time on page, pages viewed, bounce rate, etc.

Target Audiences

The target audiences for the site and their primary usage of the content are as follows:

1. Users seeking information on Yoga Teacher Training programs and the related educational opportunities (online and in-person)
2. Users seeking information on volunteer and work-exchange opportunities
3. Users seeking information on program offerings (classes, retreats, immersion study programs)
4. Users seeking rental venues/accommodation for retreats and workshops
5. Users seeking to donate or become a financially contributing member

Web Content Copy

New content will be the responsibility of The Salt Spring Centre of Yoga. Priority will be placed on pages and content that drive revenue, are legal or regulatory requirements, or critical to brand recognition and expansion. We would like to engage your expertise in creating a plan for new pages. We will manage all new content.

2. Testing

The winning proponent will work with the Centre to test, fix and retest all integrations with identified critical business functions (e.g. Retreat Guru) before Go Live.

3. Cutover & Post Go Live Support

The winning proponent will provide a clear description of post Go Live support (e.g. cutover, trouble-shooting, etc.).

4. On-going Website Hosting and Maintenance

The winning proponent is not required to also provide managed hosting services. If they do not provide managed hosting services, the Centre requests that they recommend at least two WordPress specific, managed Hosting providers with links to the recommended plan and a brief rationale. The Centre requires:

- Regular, scheduled, and predictable monthly preventative website maintenance.
- Scheduled auto-updates and testing for WordPress, active site plugins and integrations.
- Weekly site scan including malware, blacklist, & directory errors and reporting.
- Weekly site back ups.
- Guaranteed 24/7 uptime at 99%.
- Technical Support with a minimum 24 hour response turnaround time by phone and / or email. Chatbot is optional.
- Domain Management including Email.
- Storage sizing and pricing.
- Monthly / Quarterly site optimization / tuning.
- SSL Certificates for saltspringcentre.com

Budget

It is very important for SSCY to understand and budget, not only for the online environment redesign and build, but also for the total cost of ownership.

We would appreciate it if you could provide:

- An estimated budget by the Project Categories in Canadian dollars.
- Monthly maintenance pricing with any contract duration terms.
- Total cost of ownership for the website and online environment.
- Other value-add services you provide (please list in a separate category with a brief description)

Online Environment & Website Redesign

It is not necessary to break the costs down to the Example level. This column is included to ensure that the major features and services are covered and that bids can be compared.

Category	Example	$ Range from Low	$ Range to High
Site Transfer	Website Domain Transfer		
	Email Transfer & Set-up		
Hosting	Hosting (internal / external)		
Software & Integrations	SSL Certificate(s)		
	WordPress Template		
API Design & Build	Additional app's and integrations		
	Other?		
Labour	SEO Set-up		
	Online architecture & API build (Retreat Guru, Thinkific!, other?)		
	UX / UI		
	Site configuration and integration set-up		
Brand Redesign / Refresh	Optional		
Total Project Budget			

On-going Online Environment & Website Maintenance Costs

Category	Monthly	Annual	
Hosting			
Maintenance			
Technical Support			
Other Services?			
Total Annual Costs			

Response Process

Notification of Intent to Respond and Clarifying Questions

It shall be the Proponents responsibility to clarify any points in question prior to submitting the proposal. Information obtained from any source other than the contact person indicated will not form any part of this RFP and can not be relied upon. All enquiries related to this RFP will only be sent via email to the Executive Director, Sarah Kemmers.

Primary RFP Contact

The Proposal should be directed to:

> Sarah Kemmers, Executive Director
> Salt Spring Centre of Yoga
> sarah@saltspringcentre.com
> 250-537-2326

Submission Timeline and Due Dates

Our goal is to launch our new website by September 2021 in anticipation of launching new programs and services for expansion. As such, we are eager to begin the project and require the deliverables outlined in this RFP to be completed before the end of August.

Clarifying questions are due: **Friday August 6th, 2021 at 4:00 PST.**

Proposals are due: **Wednesday August 11th, 2021 at 4:00 PST.**

Applicant notification: **Friday August 20th, 2021**

Response Submission Format and Instructions

Form of Submission

The Proposal must be sent in *.pdf format* by *email* on or before the Closing Date and Time. Proposals must be addressed as follows:

> *Subject:* Proposal for Website Design, IT/Network Services

*Proponent*s are requested to stay within the page limit set out herein, including:
- Cover Page
- Table of Contents, including page numbers
- Section 1: Executive Summary
- Section 2: Process
- Section 3: Timeline / Schedule
- Section 4: Project & Team Experience
    a. Relevant Project Experience
    b. Team Lead Profile
- Section 5: Fee Schedule

The details of the contents for each section are provided below.

Section 1 – Executive Summary

Provide a maximum one (1) page executive summary outlining the following:
- The individual/firm's background and experience with not-for-profit organizations

- Understanding of the project objectives
- Any other information as deemed relevant to this project, the client and/or this proposal.

Section 2 – Process

Provide a maximum two (2) page description of the process you will undertake to come alongside SSCY for web re-design and an ongoing IT contract relationship.

Section 3 – Timeline / Schedule

Provide a maximum one (1) page detailed description of the project milestones needed to meet the launch date.

Section 4a – Relevant Project Experience

Provide three (3) examples of completed sample website projects (preferably in the not-for-profit or start-up environments. Where possible, please provide projects that are similar in scope and complexity. For each of the projects, include the following:

- A description of the project
- A summary of the services provided
- Commentary on final project costs
- A description on how the *Proponent* added value to the project
- Links to the websites
- A reference for each project

Section 4b – Team & Team Lead Profile

Provide a maximum one (1) page outlining the proposed Team in a diagram format or otherwise, including an outline of their education, experience and involvement on similar projects where they have acted in a similar role. Resumes can be attached as an Appendix to the submission.

Provide a maximum one (1) page profile to identify the proposed Team Lead including their experience and involvement with similar/comparable projects where they have acted in a Team Lead capacity.

See Mandatory Requirements Section above.

Section 5 – Fee schedule

Provide a fixed fee for the work outlined. Break down all proposed fees by deliverable. Provide fixed hourly rates for all extra service work orders outside the scope of expected services.

All reimbursable expenses are to be included in the fixed fee. No reimbursable expenses will be accepted as a separate cost.

Selection Criteria & Process

Evaluation Criteria

Customer Service	15%
Project Understanding	15%
Process (e.g. No. of consults, revisions, knowledge transfer etc.)	15%
Schedule	5%

Project & Team Experience	10%
Fee Schedule	15%
Reference Check	15%
Presentation & Organization of Proposal	10%

Mandatory Team Requirements

The successful candidate shall possess expertise working with small non-profits with limited resources. The successful candidate will be responsible for working in conjunction with the Online Program Manager and Centre Manager to determine ongoing needs and approaches. This RFP contains all the information necessary to prepare a submission for website redesign and ongoing IT/Network services.

Not for Profit Experience

Proponents must demonstrate that they have partnered with a not for profit to undertake at minimum two website design projects and at least two ongoing contracts with non-profits for IT/Network services.

Website Design Experience

Proponents must demonstrate that they have designed at least two website design projects of similar size and scope to our website's functionality and needs.

Excellent It/Network Customer Service

We are a small but passionate team looking to strategically grow our offerings in the upcoming year. We are looking for a company who aligns with our values and can support us to grow and become more financially vibrant.

Other Criteria

SSCY will review and evaluate all submitted Proposals and shall not be limited to the above listed criteria in their evaluation of the Proposals. Other criteria identified as relevant during the evaluation process such as the following general questions may be considered, provided that any and all criteria considered will be applied evenly and fairly to all Proposals that are eligible for evaluation.

• Does the proposal reflect an overall understanding of the SSCY requirements?
• What is the process undertaken to guide SSCY through website redesign and ongoing maintenance?
• Does the schedule of milestone delivery align with SSCY's expectations?
• Does the relevant project experience clearly outline its outcomes and relevancy?
• Is there not-for-profit experience?
• What did the references of relevant related projects say?
• Is the information in the proposal properly organized?
• Is the proposal free of spelling and grammatical errors?
• What is the overall quality of the proposal's presentation?
• Is the budget proposed align within budget?
• Is the fee broken-down so SSCY knows what they are actually paying for?

Evaluation Process

The Salt Spring Centre of Yoga intends to undertake:

1. All inquiries, expressions of interest and clarifying submitted by their respective due dates will be responded to by the Executive Director.
2. *All proposals submitted by the due date will be assessed by a 3-member panel.*
3. *A comparative evaluation of all Proposals received and evaluate such Proposals based on the evaluation criteria contained within this RFP. Price is not the sole determining factor.*
4. *All Proponents will be notified of the status of their submissions by business close on August 1st.*
5. *Any Proponents that are short listed will be invited to present to a review panel which will include the Executive Director, Online Programs Manager and Centre Manager.*
6. *Decisions will be communicated by August 20th to all proponents.*

Terms and Conditions

The Salt Spring Centre of Yoga does not intend to, or owe any contractual or other duties or obligations to a Proponent as a result of the issuance of this RFP.

SSCY has the sole and absolute discretion to modify or amend this RFP, suspend or cancel this RFP at any time, reject any or all proposals submitted in response to this RFP, re-advertise for proposals if desired, request Proponents to provide additional information and address specific requirements not accurately or adequately covered in their initial submissions.

SSCY is not liable for any costs incurred by Proponents or other interested parties in the preparation of any response to this RFP or subsequent interviews.

Terms of Acceptance of Proposal

Proposals submitted in response to this RFP (including team and/or experience levels presented) must remain firm and open for acceptance by The Salt Spring Centre of Yoga for a period of sixty (60) days from the date of closing.

Amendments to Proposals

Proposals may be amended by Proponents only by written amendment. SSCY must receive all amendments prior to the closing time, to the email address provided above.

Conflict of Interest

The Proponent agrees to be bound by the following requirements. Except as identified in the proposal, the Proponent must certify:

- There is no collusion or arrangement between the Proponent and any other Proponent(s) in connection with this project,

Proponents chosen to participate in this RFP process shall disclose prior to entering in an agreement any potential conflict of interest.