



LIGHTHOUSE
WRITERS WORKSHOP

**Lighthouse Writers Workshop Website Development
and Integration
Request for Proposal
(RFP)**

Issue Date: 12/5/2022
Response Due Date: 1/13/2023
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Contents	Page
1. Overview	3
1.1. Intro to Project	3
1.2. Organization Background	3
1.3. Strategy	3
1.4. Current State	4
2. Objectives & Scope	4
2.1. New Website Objectives	4
2.2. Audience	4
2.3. Volume	4
2.4. Scope	5
2.5. Timeline	5
3. Overall Design and Summary Requirements	8
3.1. Summary Requirements	8
3.2. Specific Pain Points to be Addressed	10
4. Detailed Response Requirements	10

1. Overview

1.1. Intro to Project

Lighthouse's Website is our main CRM and workshop management system. It processes most of our registrations and nearly 100% of our revenue runs through it. Our desired partner will migrate our site from Drupal 7 to Drupal 9, and in that process build API-based integrations with our other systems, including Quickbooks, to address key inefficiencies in our operations. We hope to test concurrently with the migration and build, and to have the migrated and newly integrated site ready to launch by October 2023. Our ideal partner would stay onboard for the launch and manage any issues that might come up, as well as build operating procedures and train staff. Afterwards, we'd like to maintain a contracted working relationship with our partner where they lead us in maintenance and upgrades, as well as respond to emergency outages.

Our top line budget: \$160,000, ideal range around \$125,000, and we'd love to see cost breakdown by key functional deliverables in proposals when possible.

1.2. Organization Background

For the last 25 years Lighthouse has brought the transformative power of the written word to our community through accessible and inclusive classes and events. We deliver high-quality educational opportunities that cultivate artistic growth for emerging and established writers from all ages and walks of life. Through community programs serving traditional underserved populations, to youth programs working with budding writers in schools and hospitals, to adult programs which have resulted in countless published books, we provide nurturing and ambitious creative writing education to more than 13,000 people yearly.

In 2023, we will move into our permanent home in the historically under-resourced Cole/Clayton neighborhood. It offers an incredible opportunity to continue growing a vibrant community while increasing accessibility to the literary arts to people from around Colorado. At the same time, this exciting new stage is rooted in our foundational belief that everyone has a story to tell and deserves a space to connect, share ideas, and express themselves through writing.

1.3. Strategy

Lighthouse's 2023 strategic plan focuses on four major initiatives addressing critical issues:

1. **Focus on the Whole Writer:** Provide a superior, inclusive learning experience for writers, fully supporting their development as artists and human beings.
2. **Deepen Our Community Impact:** We are inclusive, authentic, and resilient in our pursuit of this objective, reaching an ever-expanding audience. We support and encourage everyone to see writing and literature as a highly effective form of connection and self-expression.
3. **Be an Arts Cornerstone:** Be an energized and innovative leader in the artistic and philanthropic communities.
4. **Build a Sustainable and Enduring Organization:** Ensure that the impact and importance of Lighthouse is secure now and into the future.

An upgrade in our website will address the fourth initiative most directly by automating many of the processes we are currently doing by hand. We estimate a total yearly savings from a successful project of more than 400 hours of admin and accounting work, and a staff value of \$28,000. In-directly, by taking the pressure of manual data entry off our staff, we'll free up time and energy to focus on the programming that addresses the first three initiatives.

1.4. Current State

Our website needs major updates, some critical and some desired, (see 2.1 below).

Overall, our site works well enough from a customer perspective. Non-critical improvements for our customers include a streamlined search functionality and a more detailed registration process, but generally we're comfortable with the front end of our site.

The staff and backend interface is the critical part of this project, and vital improvements include better integrations and business standard APIs. More generally, the backend is cumbersome for staff, very complex and time consuming, and often buggy.

2. Objectives & Scope

2.1. Updated Website Objectives

Critical objective of migration and upgrade:

- Migrate the site to the latest fully-supported version of Drupal (assumed to be version 9)

- Optimize the site for scalability, to facilitate the growth of Lighthouse without requiring staffing to manually manage vital functions
- Ensure more accurate and timely accounting through process automation
- Mitigate business continuity risks, including security issues, functionality continuity, and staff training issues

Secondary objectives of migration and upgrade:

- Create a more manageable website functionality for staff and faculty interfaces
- Build scaffolding for future improvements, as budget allows
- Manage the need for flexibility against the need for customization
- Increased registration in courses and events based on improved functionality
- Improved accessibility.
- Better inform our community about what we're up to

2.2. Audience

The main audience of our website is our community members, but the main stakeholders of our migration and update are staff (currently 15 FTE, but constantly growing), and then faculty (more than 150).

2.3. Volume

Current site usage details:

- Hosted more than 5000 unique pages in 2021
- Average page load time: 2.98 seconds
- 1.6 million page views in 2021
- Busiest day: 23,700 page views, causing site outages
- 53% of views are desktop, 43% mobile
- Average bounce rate 2.21%

Since site launch in 2017, site currently contains:

- 53,100 orders
- 5,500 products
- 33,500 registered users
- 4,800 nodes
- 38,600 URL aliases
- 2,680 coupons
- 8,770 coupon usage reference
- 14,650 registered users

Other size notes:

- Uncompressed database on pantheon, roughly 1GB

2.4. Scope

Deep Level Engagement: January 2023 to October 2023

Planning and discovery:

- Conduct site-wide mapping to understand full scope of current functionality.
- Meet with Lighthouse's current drupal developer to get deeper understanding of current customization
- Map website integrations as we are currently using them, determine where we can be more efficient
- Work closely with accounting and development team to understand desired financial and data flow between website, accounting, and donor programs
- Work closely with Lighthouse staff to define and consolidate our tech stack
- Work closely with individual Lighthouse teams to fully understand current processes, ensuring the migrated site meets our needs
- Work with project leader to determine which non-crucial improvements can be folded into migration within budget
- Attend meetings and checkpoints with project leaders as required to meet project objectives

Execution:

- Migrate website from Drupal 7 to Drupal 9
- Migrate site and rebuild code with an eye towards scalability, ease, efficiency, and flexibility
- Integrate Lighthouse site with other business programs as agreed in final project scope, including but not limited to Quickbooks Online
- Build API for data input into and out of site, including for creation of new products on site
- If time and budget allow, work on other minor changes and fixes to the site, including but not limited to: building faculty dashboard, better data functionality, more flexible payment options, and automatic notifications.

Testing and training:

- Work closely with project leaders to build testing protocols
- Work with Lighthouse staff to test site in a wide variety of circumstances
- Resolve issues in a timely manner, before and after launch
- Work with Lighthouse program teams to build training and documentation of processes

Continued Engagement: October 2023 and on in as-needed basis

Launch and further Maintenance:

- Partner with Lighthouse staff to ensure a seamless launch of site

- Once site is built and deployed, conduct regular maintenance and updates as needed
- Work on an as-needed basis on desired improvements and upgrades to site
- Be available for emergency services, response time service level agreement (SLA) is open to discussion

2.5. Timeline

RFP	Date
RFP distributed	12/5/2023
RFP questions due	12/12 (EOD)
RFP combined/blinded answers available	12/16
RFP responses due	1/13/2023
Evaluation and communication to selected vendors	1/23/2023

LWW reserves the right to close the RFP early if the right proposal is submitted early.

Website Development & Build	Date
Kickoff	Feb 2023
Onboarding and Site Mapping	Feb to April 2023
Phased implementations and site testing	Feb to Aug 2023
Staff training and onboarding	July to Sept 2023
Website launch date	Oct 1, 2023

3. Overall Design & Summary Requirements

3.1. Summary Requirements

Critical Upgrades:

- Integration between website and Quickbooks to automate critical business processes, including automatic transfers of financial and payment data
 - *Please see Appendix B: Accounting Procedures for a sense of what our current process is.*
- Solution or API or other program to automate the upload of new content, particularly products, on our site and on Zoom when needed
 - *Please see Appendix A: Workshop Uploads of the primary process we would like to automate.*

Fully migrative to Drupal 9 all current mission-critical functionality, including:

- Basic and structured pages to display content
- Mobile-friendly
- User profiles, to include faculty, staff, members, general users, and site administrators with varying features and access
 - Particular profiles creating outward display pages, seen here: <https://www.lighthousewriters.org/instructors>
 - Users can view dashboards, that list their orders, the classes they've taken, and edit their information
- Product pages with the following functions
 - Dynamic pricing, to determine which prices users are charged according to setting in profile
 - Ability to link multiple products to single content pages
 - Collect and track user information upon purchase
 - Automatically publish and unpublish on pre-set dates
 - Recognize "types" of products to correspond to coupons
 - Integrate purchase and product information into accounting software
 - List important course information, including date, time, meeting dates, instructor with link to profile
 - Be searchable by predetermined taxonomy
 - Ability to URL redirect
 - Class rosters and email functionality available to instructors
- Membership functionally
 - Allows participants to become members, giving them discounted registration to programs

- Recognizes users who are members
 - Automatically applies membership and expiration date if purchased through cart check-out; needs to be entered manually for monthly donors, as that's currently set up through a donation form (see below).
 - Tracks and tells users if they are members on their dashboard
- Check out and cart functionality
 - Reminds/prompts/encourages those without memberships to join, adjusts prices when they join
 - Option to add donation
 - Continue shopping/check out option
- Donation form integration:
 - Currently set up so there's a separate form (managed through our donor software) for any donations that are NOT made through cart checkouts, as well as monthly memberships. There are a couple of variations of this form throughout the website, each serving different purposes (capital campaign gifts, general donations, monthly recurring memberships)
 - Similar form exists for volunteer opportunity inquiries.
- Coupon code/discount functionality
 - Includes product and order discounts
 - Can be limited by products, users, dates, types of products, and more
 - Trackable and integrated with accounting software
- Integration with common social media
- Search functionality
- Blog
 - Notification of blog updates
- Video content
- Login/Authentication
- Custom CRM including
 - Ability to report according to registration, reporting functionality widely queryable
 - Ability to report according to user information, widely queryable
 - Reports according to membership, queryable
 - Builds reports that integrate with accounting software
- Integration with Myemma, ability to integrate with Mass Email Marketing Platforms
- Automatic email communication from site to users including:
 - HTML formatted, dynamic receipts and confirmation emails, including calendar integration
 - Reminders with Zoom links
 - Survey email at preset date
- Integration with accounting and banking programs to transfer funds

Secondary Upgrades, should budget allow:

- Accessibility/ADA complaint

- Faculty dashboard to include documents visible to all faculty, and document visible to certain faculty, invoicing forms, and signable contracts
- Ability to gather additional information, i.e. accessibility needs, upon registration
- Upgraded database functionality, including:
 - Customizable queries
 - Easily printable, sortable, responses
- Improved general functionality in database
- Increased coupon functionality, including automatic generation and distribution of codes
- More dynamic cart functionality, including certain items in cart canceling pricing of others

3.2. Pain Points Addressed

Primarily, our staff spends a lot of time uploading, downloading, and cleaning up data from our site. Our needed upgrade will ensure business continuity, save our staff time and effort, increase accuracy, and allow us to focus growth on the quality of our programs.

4. Detailed Response Requirement

Please send your response as an email attachment to genna@lighthousewriters.org in whichever format works best for you (including but not limited to .pdf, pptx) to address the requirements below.

4.1. Executive Summary

Please provide a high-level synopsis of your firm's response to the RFP. The Executive Summary should be a brief overview of the engagement, and should identify the main features and benefits of the proposed work.

4.2. Approach and Methodology

Please provide a high-level description of your proposed approach and the methodology you would use to achieve the objectives of this project.

4.3. Team Composition

Please provide any relevant details about the team that you would have working on this project, including the number of team members and where they are based out of.

4.4. Communication Strategy

Please provide a high-level description of how your firm approaches communication with clients during projects, including any preferred channels or programs.

4.3. Proposed Timeline

Please provide your proposed timeline and please articulate what parts of the project (if any) your firm considers feasible to be delivered as quickly as possible, and no later than Oct 1, 2023.

4.4. Pricing

Please provide a high-level estimate of costs to do the assessment and deliver recommendations to address the requirements and pain points outlined in Section 3.

4.5. Please provide contact information

Organization Name	
Contact Name	
Title	
Address	
Office Phone Number	
Mobile Phone Number	
Email	

4.6. Please provide 2-3 descriptions/examples of prior work that best exemplifies your company's capabilities and relevance to this project

4.7. Questions and Answers

Please address questions directly to Genna Kohlhardt at
genna@lighthousewriters.org.
