NEW YORK-NEW JERSEY TRAIL CONFERENCE
REQUEST FOR PROPOSAL (RFP) - Attachment B Requirements
2016 Website Implementation Phase

1. INTRODUCTION

This Attachment to the Implementation RFP provides the NYNJTC environment high level architecture and the requirements we wish to have implemented. In many cases, the requirements describe the desired functionality in only a general way and the Trail Conference is looking to the Respondents to provide design solutions using the best available technologies for our environment and architecture.

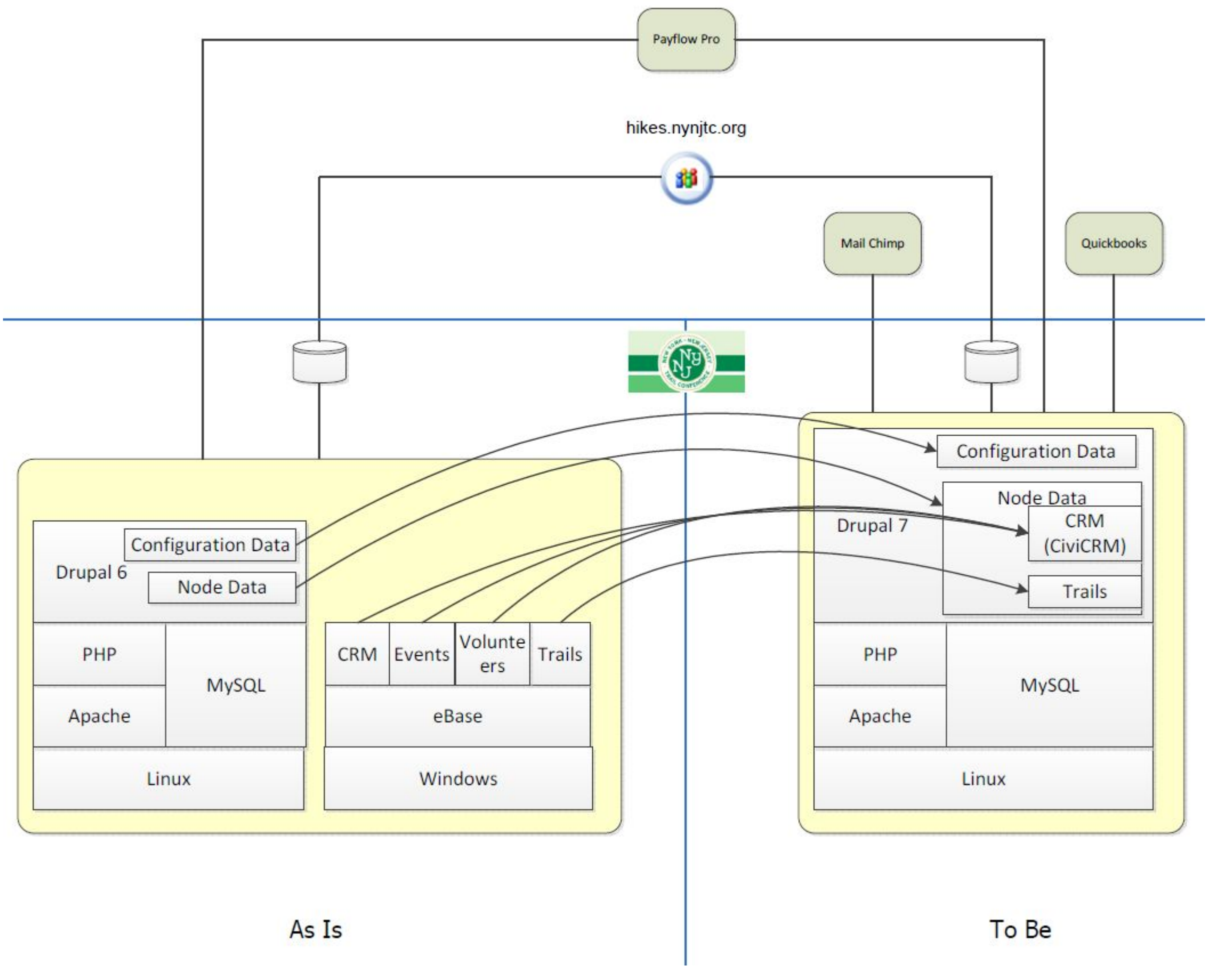
At a high level, the implementation can be broken down into four areas:

1. Framework migration (i.e., upgrading from D6 to D7)
2. Data migration (i.e., migrating CRM **data** from eBase to Drupal (CiviCRM); migrating Trails data from eBase to Drupal)
3. Functionality migration (i.e., migrating CRM **functionality** to CiviCRM; migrating e-commerce functionality from Ubercart to Drupal Commerce; migrating Trails functionality to Drupal)
4. Design (i.e., changes to website layout, design and navigation)

In addition to the above four areas, the requirements outline the high level architecture of the NYNJTC environment and project management expectations.

2. ARCHITECTURE

The diagram below shows a high level logical architectural view of the Trail Conference website before and after the migration and upgrade.



3. Project Management

We seek to implement the project using agile management, design and build methods to provide quicker, iterative, and timely delivery.

The proposed development methods, plans and project management process must:

1. Enable team members to stay aligned with weekly goals
2. Track progress of design, development, testing and implementation
3. Monitor and track time and costs
4. Provide consistent weekly reporting
5. Enable change management and discussion of trade-offs to ensure that most desired features are implemented.
6. Support predictability of project completion
7. Maximize feature and functionality completion within the approved budget.
8. Provide tool(s) for visibility into project scope, progress, and issues.
9. Define development in stages with early visibility into prototypes.
10. Provide a plan and methods to implement features in stages and pilot early.

As a client, NYNJTC expects its representatives (staff and volunteers) to be active members of the team. The NYNJTC thrives on the engagement and contributions of its volunteers. The Technology Committee made up of technical professionals is expected to be actively involved in the project.

Please clarify your time commitment expectations:

1. How many hours per week for the Project Manager?
2. How many hours per week for the technical lead and technical team members?
3. How many hours per week are anticipated for staff especially for the functionality migration and website design requirements? Less in the beginning, greater during design and end-user testing?

4. Framework Migration

Current Production Environment

The current production environment consists of:

1. A2Hosting - web hosting service using Managed Flex Dedicated Servers, Elite Managed Flex
2. CENTOS 5.5 x86_64 standard
3. MySQL 5.5.42
4. PHP 5.3.29
5. D6 - latest release 6.37
6. CloudFlare frontend
7. Ubercart - Payflo Pro/verisign
8. Daily backups of full machine
9. Backup & Migrate - size (about 55Mb gz)
10. Approximately 7,300 nodes, 67 content types, 160 views
11. Current CRM:
    a. eBase - offline
    b. 52,000 member records, 1,600 trail records, many thousands of donation records, 20+ other tables of varying sizes (none very big)
12. Subdomains (in scope of this RFP)
    a. hikes.nynjtc.org - the hike finder app, will need to move inside the site.
    b. tsr.nynjtc.org - Tristate Rambler club

   c. interstatehikingclub.org - has their own domain but on our server
   d. WordPress blogs
      i. Trailwalker (blog-tw.nynjtc.org)
      ii. Trails to Great Photography (blog-photo.nynjtc.org)
13. Subdomains (out-of-scope of this RFP)
    a. nyh.nynjtc.org - NY Hiking club (will go away shortly and is therfore out of scope)
    b. old.nynjtc.org - pre-Drupal site with some content that has never been moved but may be some references to it on live site.
    c. lists.nynjtc.org - handle mailman mailing lists (which should go away on new site)
    d. a bunch of shortcuts to specific live pages, e.g. catskills.nynjtc.org that just redirect
    e. some other old sites that have no dns pointing to them but can still be gotten to, e.g. dsh.nynjtc.org - which was the first version for DSH. (most of these can be deleted)
    f. lhprism will need to be moved to the shared server account on A2hosting.
14. Active social media presence (Facebook, Twitter, G+, LinkedIn, Youtube, etc.)
15. Heavy use of Organic Groups, Calendar, volunteer management, events
16. Site currently maintained by 2 volunteer webmasters (all sysadmin, new features - occasional small contracts) and 10-15 staff or volunteer content creators.

Drupal Migration Requirements

1. Migration from D6 prior to its obsolescence to D7 or D8 is a primary requirement for this project. Respondents must indicate their choice of D7 or D8 and provide the reasons for this choice. Reasons may include lack of necessary Drupal modules or other capabilities in D8. The required e-commerce and CRM functionality must be provided using the chosen Drupal release.
2. The proposed migration plan must provide a list of the core components and additional modules needed to support the requirements identified in this document.
3. If we are to upgrade to D7 before D8 ensure best practices are followed in implementation.

Staging and New Production Environment Requirements

1. The staging environment for the new site must ensure that the production site is not impacted or changed.
2. Provide periodic access to tested deliverables outside of the current production environment.
3. The new production environment must provide web hosting, disaster recovery, performance planning, security, and backup best practices to minimize or eliminate the need for NYNJTC representatives to perform server management.
4. The new production environment must support transactional email, volume limits and blacklist support through integration with a transactional email service such as Mandrill or SendGrid.
5. The new production environment must accommodate the primary website and secondary domain to simplify website administration and management.
   a. Primary site - nynjtc.org
   b. Secondary site - hikes.nynjtc.org
6. Provide a backup and disaster recovery methodology. The methodology may be an integral part of the services provided by the hosting environment.
7. Provide possible solutions, which may include web hosted or cloud subscription based models, to meet our requirements and cost constraint of $3,900/year or less.

Security

The ability to manage roles, permissions, and policies must be delivered with the new system and is expected to be functionally equivalent to the current system.

1. Provide recommendations for what security modules should be used, how site should be configured/architected for security, and administration procedures.
2. Provide database secure recommendations and procedures.
3. Provide HTTPS configuration and administration procedures for the site.
4. The current system authenticates users by collecting their username (or email address) and password and then using Drupal's basic Auth process to validate those values against the credentials stored in the Drupal database. This process will not change in the new system.
5. CiviCRM data needs additional protection and has significant additional mechanisms. These additional protections will be discussed during implementation. Please see:
   http://gitbook.civicrm.org/initial-set-up/security.html
   http://gitbook.civicrm.org/initial-set-up/permissions-and-access-control.html

The current roles are listed below along with a brief description. Users of the system will be assigned one or more of these roles, either automatically by the system as the result of an action they take, or manually by an administrator. A complete mapping of roles to permissions is available to Admin users on the live site. Some roles are used to restrict read access for certain content to specific groups. Once we have a CRM many of these will change.

1. Anonymous - any non-logged on user (cannot comment but can buy)
2. Authenticated - logged on user can comment and fill out most forms
3. Active Volunteer - used for access control - no additional permissions, except exempt from CAPTCHA
4. Customer - not user (proposed to mark people who have bought things)
5. Hike submitter - additional permission to submit and change hikes and parks
6. Member - marks people as members - controls whether they get a discount
7. Protected - additional access protection - not well defined currently
8. Registering - someone who has registered but has not verified their email address. Behaves like anonymous until verified.
9. Admin - significantly more permission than editor (some dangerous)
10. Board - access protection
11. Crew - access protection
12. Editor - can create and edit most content
13. Forum Moderator - can moderate comments, forums
14. Staff - access protection
15. Store Owner - addition access protect and create/edit store pages
16. Tech - most privileged, just shy of user=1 (webmaster)
17. Trainer - access protection
18. Spammer - blocked users who have submitted spam (there are some blocked users who are not spammers because we block people who created a second account and have purchase data which we can’t combine with their newer account)

Search Engine Optimization (SEO) Requirements

URL Structure

Page content URL Strings should not be modified or changed. This includes Hikes and Parks. Careful attention to these pages and the meta data applied is a requirement.

1. If content relocation recommendations do occur, please provide outline for redirect strategy (Spreadsheets/Implementation/Cost)

2. Adwords: The Trail Conference currently deploys over 600 ads via a Google Grant Program. Any change to the URL structure will impact our adwords program and quality scoring.

Meta Data Structure

The new site development page templates must detail and contain these required html elements.

The page WYSIWYG page editor will provide access to all styled CSS/tags/Classes used on the site in order to enable publisher's access while creating or editing content.

Meta:

1. Title: (Required)
2. Description: (Required-ability to customize)
3. Canonical Attribute
    a. We can discuss canonical meta data usage for content that may appear to be duplicate or similar, but we should have that in the page dashboard to select as an option.

HTML Tags: (Accessible in the page editor)

Required tags:

1. <h1>Main Title</h1> Required
2. <h2>Sub Title</h2> Required

Optional Tags:

1. <h3>Sub heading</h3> Several Instances
2. <h4>Sub heading</h4> Several Instances
3. <h5>Sub heading</h5> Several Instances

Additional Attributes

1. Images – Page Editor should provide in-page text entry (alt description) to any image or graphic used within page
2. With the above elements properly applied, a page would naturally be compliant with Section 508 Users with Disabilities Act. Example Checklist: http://webaim.org/standards/508/checklist

Landing Page Template and Optimization

As part of the creative templates, we would like a minimalist template with slider that provides some level of functionality for targeted campaigns. Landing pages will be utilized for targeted fundraising/acquisition. Global Menu and link choices should be optional.

1. Maintain branding
2. No menu/footer (optional)
3. Slider/Static Slider image
4. Contains a short form (Name, Email, Phone and Submit or download)
    a. Customizable forms? Ability to add/delete/customize fields?

5. Data Migration

Existing Website Data

1. The Trail Conference will be migrating 27 content types containing approximately 250 CCK fields from the existing D6 site. In order to facilitate the migration of this content, the Trail Conference is

working on creating D7 feature modules for each of the 27 content types. These feature modules will be made available for use during the data migration. Some of these feature modules contain views and other views will need to be recreated for the new system.

2. The views in our feature modules and most of the views on the current system use the table format which does not work well in small screen devices. The vendor is expected to propose alternate ways of displaying our information that fits in with our overall goal of bringing the site design up to current standards as well as making the design responsive.
3. The existing site contains an online Ubercart store with ten D6 content types representing products offered for sale.
4. In addition to the site content, there are approximately 20 organic groups and approximately 22 taxonomy vocabularies that will need to be migrated and configured.
5. There are over 27,000 records in the users table that must be migrated to the new system.
6. There are 18 existing user roles that may need to be reconfigured depending on what is proposed relative to the security requirements.
7. We currently have 4 input formats configured on the D6 site. We would like to eliminate at least one of these and need you to reconcile and remap the differences during the data migration.
8. There are approximately 362 existing blocks associated with our default theme that need to be migrated.
9. There are two feature modules on the existing D6 site that provide functionality that we will also need in the new environment. One provides a custom calendar view and the other provides a custom sales report filtered by tender.
10. The Trail Conference will be migrating all photos from the existing D6 site. The current structure makes it difficult to find and reuse images. We must have a customized upload form with easy instructions that requires metadata be collected for each future photo upload. A tagging system is preferred. A photo library search function is a must. The following example is not perfect, but is a good starting point for what we're looking for: http://ki.se/en/ki/image-management-in-drupal.

Existing eBase Data

There are several databases currently hosted on eBase. All of these databases must be migrated to the new website. Some of these databases will become integral to the new CRM Drupal module. Others will require a custom Drupal module to provide storage and access.

The data migration strategy including data cleanup will be part of the implementation planning.

CRM Data

1. Bio
    a. Basic member information
2. Clubs
    a. Contacts
    b. Membership type
    c. Activities
3. Contacts
4. Courses
5. Development
    a. Contribution history
    b. Pledges
6. Events
7. Household

8. Notes
9. Payments
10. Roles
11. Volunteer
    a. Actions
    b. Roles
    c. Interests
12. Workshops

Non-CRM Data

1. Parks
2. Trail Tracking
3. Trails
4. USDA
    a. Invasive Plant Surveys
5. Work trips

Trails Data

The Trails data currently stored in eBase must be migrated to Drupal so that it is available to the new Trails functionality that will be built into the system. The Trails data consists of the following information:

1. Configuration Data - in order to enforce consistency in the data we collect, certain information will be managed by a database administrator since it will change rarely. This information will be available in entry forms as user setable fields to promote consistency.
    a. Geographical partitions - States, Counties, Towns, Hamlets, Regions, Parks
    b. Trail Inventory - physical improvements to a trail such as puncheons, bridges, crib walls
    c. Trail Invasives - table listing all invasive species
    d. Trail Features - some examples are: shelters, viewpoints, nearby parking
2. Physical Data - although this information can change, it will change infrequently; the ability to change this information should be restricted to an administrator
    a. Trail - a single path from one place to another
    b. Trail Segment - the smallest piece of a trail whose division points (segmentation) occur at predefined physical locations such as landowner boundaries. Trail Segments will have an association to Trails as well as to the tables mentioned in the 'Configuration', 'Personnel' and 'Work Activity sections. Segments shall also have a checkbox or other control that indicates that there are threatened and endangered species in the vicinity of the segment.
    c. Corridor Monitoring Segments - a contiguous area adjacent to a boundary; this table will have attributes similar to a Trail Segment
    d. Invasives Location - an area containing invasives; definition as a polygon would be desirable so that it could be used in mapping programs, but may have to settle for just a text description. Invasive Locations will have an association to the tables mentioned in the 'Configuration', 'Personnel' and 'Work Activity; sections.
3. Personnel - the people involved the day-to-day operation of the parks and trails. Note that the object types listed below will extend a Contact object, which will be stored in CRM.
    a. Maintainer - a person responsible for maintaining or monitoring a segment or segments of a trail, which includes 'Trail Maintainers', 'Sawyers', 'Swampers', 'Invasive Crew Members', etc.
    b. Corridor Monitor
    c. Supervisor - manages Maintainers
    d. Chair (LTC) - manages Supervisors

   e. Region (RTC) - manages Chairs
4. Work Activity - any work activity performed in the park must be recorded and associated with a Trail Segment. This includes work by Maintainers, Sawyers, Invasive Species crews, assessors, bridge inspectors, corridor monitors etc. The problem that we will have to overcome is that each group collects different data. An objective will be to unify the data collected as much as possible.

Store Data

1. All transactions currently stored within Ubercart shall be migrated to Drupal eCommerce, with care being taken to make sure that there are no duplicate membership transactions migrated from eBase.
2. All products available for sale within Ubercart shall be migrated to Drupal eCommerce.
3. All workshops requiring a fee shall be migrated to Drupal eCommerce.

6. Functionality Migration

CRM Platform and Functionality

Our preliminary analysis shows that CiviCRM is the most viable fit for our business needs. We are open to other solutions and recommendations that meet or exceeds our requirements.

Features required in a CRM platform:

1. Fully integrated with D7 or D8
2. Support features such as: contacts, donations, events, member management, volunteer management, grants, petitions, bulk emails, group management
3. Open source
4. Integrates with Drupal eCommerce
5. Integrates with trails and volunteer data (i.e., to show trail, non-trail, workshop and meeting hours spent, length of volunteer service)
6. Integrates with email for the purpose of performing mass mailings
7. Integrates Drupal and CiviCRM WYSIWYG editors (see http://wiki.civicrm.org/confluence/display/CRMDOC/Configuring+CiviCRM+to+Use+the+Default+Drupal+Editor
8. Integrates with Drupal groups
9. Privacy protections
10. Large user base and commercial track record (>1000)
11. Available end user documentation
12. Canned reports for easy customization if needed
    a. An example of a canned report: A site admin shall have the ability to generate a report of current members (to be sent to Campmor).
13. Provide a report editor for creating ad hoc reports. The report criteria (scripts) shall be saveable for future execution.
14. Report results shall be exportable in text and/or CSV format.
15. Views integration
16. Provide a concept of a 'household' containing two or more members/volunteers.
17. Maintains relationships
18. Record activities
19. Provide NCOA processing

20. Supports automated workflow (e.g., members that show an interest in volunteering on their membership form should have their information flow from the Volunteer Coordinator to the Program Coordinator)
21. Provide ability to merge transactions from one member into another, and mark one member as obsolete (e.g., to account for when members get two member IDs)
22. Provide the ability to capture and report on administrative time. Admin time is included on many of the reports but they don't capture time spent at long meetings or training easily and some of these can be inferred from the attendance list at a training so don't want to double count.
23. Provide the ability to categorize contacts outside of the main membership, volunteers structure, such as media, parks, business contacts.
24. Provide the ability to create and manage bulk mailing lists and automatically integrate with with bulk email platform.
25. Provide the ability to rate volunteer performance as part of Volunteer management.

Trails Functionality

The functions the system will provide related to Trails can be categorized as either 'Provisioning' or 'Consumption'. 'Provisioning' will involve the creation or modification of data in the Trails database, typically to report a problem, or to record an action that was taken to correct a problem. Another type of provisioning would be to aggregate and tag previously entered information. Creating a supervisor's report would be one example of this. The exact mechanism for provisioning information in the system is TBD, but HTML forms are definitely preferred. The HTML forms listed below are available on the current web site and are being used to varying degrees for the Provisioning function. All of these forms must be integrated with the Trails data.

1. Maintainer
2. Sawyer report
3. Crew report
4. Approval
5. Problem report
6. Illegal usage

'Consumption' will involve the ability to search for previously provisioned information and format that information into a report.

The following are sample Use Cases/Requirements:

1. An authorized user shall have the ability to search for a Trip Report that they have authored.
    a. Alternate Use Cases: Search/filter by date range
    b. Search/filter by trail
    c. Search/filter by segment
    d. Sort search results
2. The results for a Trip Report search shall consist of the following information presented in tabular form.
    a. Date
    b. Report Type
    c. Trail
    d. Segment
3. An authorized user shall have the ability to display the details of a Trip Report returned in search results. The details shall be specific to the report type.

4. A Supervisor shall have the ability to aggregate the Trip Reports of their subordinates within a specified date range into a 'Supervisor Maintainer Summary' report, add notes or other details, and save the report. The associated Trip Reports shall be locked from further editing at that point.
5. A Supervisor shall have the ability to list the trail segments that do not have a Maintainer's report for a given time period.
6. An authorized user shall have the ability to change the Maintainer associated with a trail by name. The current system requires knowledge of the Maintainer's ID.
7. An authorized user shall have the ability to determine any position that is vacant. This shall not require the creation of a user named "Vacant".

Store Functionality

The ability to operate an online store must be delivered with the new system and is expected to be functionally equivalent to the current system. Since the online store provided by Ubercart and the order fulfillment and customer information provided by eBase are discrete systems, there are a number of processes that must be handled manually today. By integrating the CRM and ecommerce functions into the website, many of these manual processes can be eliminated. The following requirements address some of these issues.

1. The site shall capture and store the tender type (i.e., Visa, Mastercard, Amex, Paypal) in addition to all the standard e-commerce transaction information such as billing address, shipping address, email, etc. This information shall be either exportable into a CSV file, or part of an electronic feed to Quickbooks.
2. The site shall have an electronic interface with a gateway to the credit card payment processing network such as Payflow Pro.
3. The site shall capture and store a transaction ID as a record of any interaction with the credit card payment processing network.
4. Email confirmations for completed store transactions shall be automatically mailed to customers, and shall contain all the pertinent information related to a transaction and its status. A user shall not be required to click on a link in the email and log in to see the transaction information.
5. A site admin shall have the ability to generate a report of store transactions for any specified period of time. The site admin shall have the ability to filter or total the report by the transaction type. Specifically, membership transactions must be segregated from all other store transactions in the report.
6. A site admin shall have the ability to print membership cards in bulk.
7. A site admin shall have the ability to print sales receipts in bulk based on a list of transactions selected from a report.
8. A site admin shall have the ability to print donation thank you letters in bulk.
9. Member discounts for any store items shall be prominently displayed.
10. A site admin shall have the ability to credit a customer for a membership discount that was not received.
11. A site admin shall have the ability to place an order in the store on behalf of a phone-in or walk-in customer.
12. A site admin shall have the ability to accept any form of payment (cash, check, credit card, Paypal) for phone-in or walk-in customers, and record this information as part of the transaction in the system.
13. A site admin shall have the ability to print shipping labels in bulk based on a list of transactions selected from a report.

14. A site admin shall have the ability to mark certain store items as out of stock, and have this reflected in the information presented to customers in the store. Specifically, a site admin should not be required to manually remove a radio button for XL size shirts when they are out of stock.
15. A site admin shall have the ability to generate a report of store transactions by state or ZIP code. The site admin shall have the ability to filter the report by SKU or other product/bundle identifier.
16. A site admin shall have the ability to perform a daily reconciliation of the Paypal transactions against the Quickbooks transactions.
17. The store shall make electronic books available for purchase.
18. Courses and workshops that require a fee shall be processed through the store. This will eliminate the current process of requiring the user to make a donation in the amount of the course fee and adding a comment to that effect on their donation form.
19. The number of seats in a course shall be treated as any other inventory item, and when a course is filled, no further registrations should be allowed.

Bulk Email

The TraIl Conference uses Constant Contact with a subscribed list synced manually each month with eBase. This system requires staff/volunteers to create Ebase files for every address they receive before sending any emails to them, a time-consuming, error prone and unresponsive process.

While the Trail Conference looked at CiviMail and Mailchimp as potential solutions for bulk mail integration with a CMS, we are open to suggestions that will best fit our needs.

The following is a summary of our must have requirements:

1. Set permission parameters to ensure that sender can only send bulk emails to groups or members within their scope.
2. Content editor that enables use of rich text and HTML formatting using predefined, responsive templates. The editor must support easy copy/paste without formatting issues.
3. Must provide continuous preview while editing the content, or available preview option.
4. Image manipulation tools such as resize, border options, placement and text wrapping.
5. Provide predefined blocks such as subject, teasers, headers, for structuring the content.
6. Automate footers to include all standard contact information and social media links.
7. Support multiple users with tiered permissions. See item #1.
8. Failsafe mechanisms to confirm sending to the desired mailing list.
9. Automatic CRM updates for unsubscriptions.
10. Reports: bounces, open read status on desktop vs mobile, spam reports, optouts, open, clicks, drill-down detailed reports from top level for analysis
11. A/B testing of email campaigns.
12. Facility to design email templates to have available from simple dropdowns.
13. Current mailing lists must be available from CRM
14. Provide method for resolving bounced emails.

Email Lists

It is desirable to have a facility to easily create and manage two-way mailing lists for use by registered users that are approved members of organic groups. Features provided by Organic Groups List Manager may address our needs:
https://www.drupal.org/documentation/modules/og2list
https://www.drupal.org/node/59335

Secondary Sites

Our only secondary site is hikes.nynjtc.org. It must be seamlessly integrated with the new site.

hikes.nynjtc.org is essentially a single page web application that uses the Google Maps API and other libraries to plot nearby hike trailheads on a map based on input criteria provided by the user. Each trailhead plotted on the map provides a popup window showing some details about the hikes at that trailhead with links to the Drupal site for more complete information. It currently works with data in a JSON file of a subset of hikes and parks data from the Drupal database. The JSON file is created by a php script that is run by cron every day.

We would like this functionality to be brought into the Drupal site so we can eliminate the external site and perhaps the necessity of the JSON file creation if the Drupal database can be used for this directly. We also want this to be mobile friendly.

7. Website Design

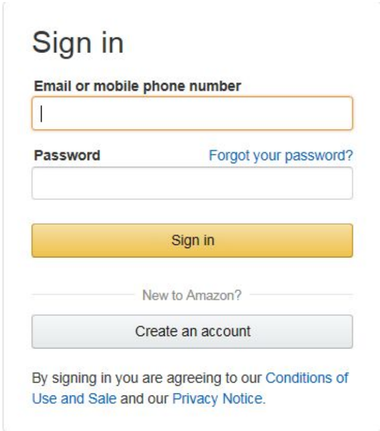
Visual Design

The 'Scope of Work' section of the RFP states that a redesign of the website to a "clean contemporary, responsive front-end design" is desired. Translating something subjective into absolute requirements is difficult, and will take multiple design discussions to arrive at an overall plan. In the meantime, there are a few absolute requirements (shall), and some objectives (should) that can be stated.

1. The web site shall provide accessible features for people with disabilities. The specifics of these features are defined in the Section 508 standards.
2. The web site shall have a footer section that where possible given space constraints should mirror the navigation provided in the header. In addition to providing an alternate form of navigation for the average user, it is a way to meet some of the Section 508 standards.
3. A site admin shall have the ability to configure popovers for membership generation and/or other campaigns at a page level.
4. Popovers for membership generation shall not be displayed to users that are already members.
5. A site admin shall have the ability to configure the display of sponsor content at a page and/or content level.
6. It should not take more than 3 clicks to reach most pages.
7. Any redesign of the site should attempt to reduce any impact on the SEO characteristics of the site (i.e., changing the addresses of any page would have a negative impact on SEO).
8. The site shall have a flat design (i.e., removal of drop shadows, gradient buttons, etc).
9. All of the links in the left rail must be eliminated if possible by moving the functionality to the header navigations, or to other areas on the page.
10. The site shall provide personalization via Drupal homebox or equivalent to customize for various roles on the site.
11. Modifying the navigation on the site is a complex task that will require further discussion, but some specific recommendations are as follows:

Comment	Suggestion
The link for logging in is in unconventional, non-obvious location. Ditto for the logout link.	Eliminate the 'Login/Register' link from the left rail. Place a link or button in the upper right corner of the page which is where most users expect to find it. Once the user

<table>
<tr><td></td><td>has logged in, the link/button should be renamed “Log Out”</td></tr>
<tr><td>The ‘Log In’ page has three tabs for the actions of creating an account, logging in or requesting a new password.</td><td>Typically these three options are all provided in the same form like on Amazon. This is the preferred design and strong consideration should be given to themes that support this model. Of secondary consideration is the ability to change the wording on the form to suit our needs.



</td></tr>
<tr><td>We have made the distinction between registering and becoming a member overly complicated, and have devoted a page to explaining the difference.</td><td>Eliminate the ‘Register vs. Join’ link from the left rail. The process of becoming a member should be disjoint from the registration process. Since converting users to members is a fundamental goal of the site, there should always be an easy way of converting these users from a fixed location (button or navigation) on the site. For those users that are harder to convert, an occasional popover asking them to join could be a solution.</td></tr>
<tr><td>Many of the links in the left rail are superfluous since they can be reached from the main navigation selection.</td><td>All links in the left rail should be evaluated to make sure there is a way to reach the associated page within the 3 clicks that we are setting as a goal.</td></tr>
</table>

Some other observations with suggested solutions:

Comment	Suggestion
It’s not clear that the top level navigation selections are links to landing pages.	Keep the landing pages since they are useful, but make it more obvious that the top level headings such as “Go Hiking” are also links. Most sites solve this by changing the styling on a mouse-over.
Advocacy issues are buried on the site, and should be brought to the forefront, or at least the same level as finding hikes.	Make sure that Advocacy is considered when we design the new navigation.

The "Click for Hike Finder Map" button on the 'Find a Hike | Find Hiking Trails' page is easy to overlook.	Improve the iconography of the button.
The long lists of hikes and parks in tabular form are difficult to use.	Propose responsive mobile friendly solutions for searching and filtering hikes.
We have one main blog and member contributed blogs, that are lost on the home page. ● http://blog-tw.nynjtc.org/ ● http://blog-photo.nynjtc.org/ ● http://thelongbrownpath.com/	Provide a more prominent location on the homepage to increase visibility and traffic.

The NYNJTC will provide desired information layouts to the selected Vendor to assist with the website user interface design and development process.

Search

Robust search features must be provided as part of this project:

1. The site shall provide the ability to search for text within web pages on the site.
2. The site shall provide the ability to search for text within documents uploaded to the site.
3. The site shall provide the ability to search for images uploaded to the site based on metadata associated with the image.
4. The site shall provide the ability to return search results that are appropriate to the role of the user.
5. The site shall provide the ability to see a textual description/synopsis, content type, author, modification date, number of comments, number of attachments and number of associated groups for each line item of the search results.
6. The site shall provide the ability for search results to be filtered based on content types and/or categories. Only the content types and categories available in the search results shall be presented for making the filtering choice.
7. The site shall provide the ability to perform an advanced search that matches any, all or none of the provided search terms.

8. Documentation, Training and Support

Documentation

At the end the project we must have documentation that captures what was implemented as well as end user documentation for the software that will be used by Trail Conference staff and volunteers. Documentation must be provided for:

1. Any customized components
2. System configuration including performance tuning (caching)
3. UI Design (mockups, wireframes, sitemaps, etc.)
4. Test plan
5. Training manuals

Training

The scope of this RFP will impact all users of the website, many active volunteers and staff who depend on eBase to perform their daily work. Therefore the Trail Conference requires that training be provided for all the new work that will be contracted as part of this RFP.

We expect the new CRM and eCommerce to require the most training. CRM end user and system administration training will be critical success factors. A “train the trainer” approach will enable a few Trail Conference individuals to become in-house experts to then provide additional sessions and on-going support. However we are open to all suggestions including technology-based options, that will enable effective training while keeping costs as low as possible

The RFP response must provide:

1. A training proposal to address CRM, eCommerce
2. Cost of additional training if needed
3. Availability of web-based training by vendor

Support

While the scope of this RFP covers the implementation of the above project, its success depends on the ongoing support and maintenance of the new infrastructure.

The post-implementation support proposal must include:

1. Support cost structure
2. Description of support model: web-hosted or software as a service model pricing
3. Help desk technical staff access options
4. CRM support