



Request for Proposals – ROC USA® New Website and Marketing Websites

Release Date: Oct. 3, 2023

Proposal Due: Oct. 24, 2023

Submit Proposals: Email to Devenie Scott, dscott@rocusa.org

Overview

ROC USA® is seeking a consultant or vendor who can assist in the development and management of a new website and marketing website template. This consultant or vendor should be experienced in branding and design that would achieve the listed goals and objectives mentioned under this RFP. ROC USA is soliciting proposals from all interested and qualified entities (independent contractors, consortia of contractors, and/or vendors) to complete the following services:

1. Website Development and Management
2. Marketing Website Templates and Conversion
3. Training and Documentation

This RFP does not obligate ROC USA to award a contract or complete the project and ROC USA reserves the right to cancel the solicitation if it is in its best interest.

Goals and Objectives

The chosen vendor will provide two (2) solutions, a new ROC USA website and a new template for ROC Marketing websites.

ROC USA Website

The chosen vendor will create a site that achieves the following:

Improve Online Presence

- Replace rocusa.org with a modern and visually appealing website that reflects our brand identity.
- Optimize the website for search engines (SEO) to improve online visibility and organic traffic.

Enhance User Experience

- Ensure the website provides an excellent user experience across all devices.
- Develop architecture that results in compelling landing pages to engage different stakeholders and diversity in information.
 - Implement clear and persuasive calls-to-action to guide visitors from several audiences toward desired actions, including established ROC Members and leaders, community owners, funders/donors, lawmaker and policy staff, news and media, homeowners in MHCs, and general public.

- Provide intuitive navigation with clear and organized menu with easily understood labels, implement a logical hierarchy, and include a search bar for users to find specific content quickly.
- Investigate and provide an alternative solution to Google Translate to present content in Spanish.
- The website is accessible to all users, including those with disabilities.
- Use compelling and action-oriented language and calls to action visually stand out with color contrast and button styling.
- Include User Support
 - Provide multiple channels for user support, such as chat, email, or a help center.
 - Offer a well-structured FAQ section to address common questions.

Increased Brand Awareness

- Strengthen Brand Identity
 - Showcase our company culture, values, and achievements to build trust and credibility.
 - Celebrate media coverage of our work.
 - Clearly able to demonstrate the difference in our work with the different lines of business (ROC USA, ROC USA Capital, ROC Association) that will begin to chip away from the narrative that we are “ROC” or “just the bank”.
- Boost Social Engagement
 - Integrate social media sharing buttons and feeds to encourage user interaction and content sharing.
 - Easily able to update the website with valuable and timely information.

Improved Website Management

- Streamline Employee Workload
 - Develop integrated home/vacant site listing platform that in addition to displaying on each community’s site, also curates all listings across the portfolio on a centralized landing page of ROC USA’s site.
- Monitor and Analyze Performance
 - Set up robust analytics tools to track website traffic, user behavior, and conversion rates.
 - Regularly review analytics data to identify areas for improvement and optimization.
- Ensure Legal Compliance
 - Ensure the website complies with all relevant privacy laws and regulations.
 - Maintain up-to-date terms and conditions, privacy policy, and cookie consent mechanisms.

ROC Marketing Website Template

ROC USA’s Marketing Websites provide each ROC with an externally facing marketing tool to highlight its community with custom narratives, photos, tours of the community and a place to list homes and lots for sale. The Marketing Websites also feature a Members Portal where residents can upload documents and photos into an external cloud storage that can be viewed by all of those in the community. Users can also create, edit and remove home and vacant site listings.

The chosen vendor will create a marketing website template that achieves the following:

- Bring the approximately 90 individual community marketing websites into the same production platform as ROC USA's primary website. (Example sites: <https://halifaxestates.coop/> and <http://www.parkplaza.coop>).
- Enhance current home/site listing platform to allow users to edit, remove listings as well as post.

About ROC USA

ROC USA is not your typical affordable housing organization. We are a nonprofit social venture with a mission to support homeowners in manufactured home communities to achieve affordable and environmentally sustainable self-governing cooperatives. make quality resident ownership viable and successful nationwide and expand economic opportunities for homeowners living in MHCs.

We envision millions of homeowners and families thriving in sustainable, resilient, and mutually supportive resident-owned manufactured home communities. Our vision is both bold – millions of homeowners – and clear – sustainable, resilient, and mutually supportive resident-owned manufactured home communities. We are not trying to be all things to all people – we serve homeowners in MHCs, period. We also think long-term, which means our work with communities involves both physical communities, operational strength, and social well-being.

ROC USA takes a market approach to mission work. We help low- and moderate-income homeowners compete with private equity funds to purchase their communities. Resident ownership is achieved when homeowners in MHCs form a co-op and acquire the underlying land from a commercial owner. To make ownership possible, ROC USA creates purchase opportunities through market development in industry and negotiations with investor-owners, provides training and technical assistance through both a network of nonprofits (CTAPs) and a national team in states not served by a CTAP. ROC USA also provides financing through ROC USA Capital, a \$300 million national Community Development Financial Institution (CDFI).

We speak to many audiences, and in general we talk about our work using the language of interdependence. Affordable housing is something we all have a stake in. Every city/region/state etc. only prospers when all the communities in it prosper. As housing costs have outpaced incomes, it's more important than ever to make sure that good places to live are within the reach of lower-income families. Manufactured home communities make homeownership a possibility for some 3.5 million Americans, and more than 75 percent of owners of manufactured homes are low-income. Manufactured home communities are a way to make sure good places to live are within the reach of local workforces. When commercial owners are looking to sell, they have a powerful opportunity to leave behind a legacy of community investment by selling to their existing residents. By supporting homeowners to purchase and operate their communities, ROC USA's model is a uniquely effective way of promoting asset development and wealth creation – especially in low-income communities and communities of color.

Internal Structure and Service Units

ROC USA has seen significant growth since its launch in 2008 as our footprint and portfolio of resident-owned communities has increased. Currently, we are organized into [six Service Units](#) with 32 staff members.

Starting in 2021, ROC USA continues to undergo an organizational reset. ROC USA is focused on the foundation for growth through clarity about how the organization serves a network of nonprofit organizations, clients (communities and leaders), changemakers and partners (investors, legislators, and mission-oriented entities). The current ROC USA website does not reflect this significant change in our approach to the work.

- *ROC Movement.* With the inclusion of the [ROC Association, ROC Movement](#) is the member voice and leadership that drives community change at the local and national level. Its purpose is to support a strong peer network of co-op leaders and advocate for and represent ROCs on the ROC USA Board of Directors and with stakeholders across the country.
- *Cooperative Solutions.* Supports an established network of Certified Technical Assistance Providers that conduct market development and pre-purchase support to MHCs as well as support a portfolio of ROCs in their post-purchase set of activities.
- *Training and Continuous Learning.* Supports the learning and development of resident leaders, technical assistance providers, and staff at ROC USA. This Service Unit currently leverages Litmos as ROC USA's learning management system. There is an opportunity for the end user to have a clearer path to the platform via our ROC USA website and Marketing Site template.
- *Community Finance.* Also known as ROC USA Capital, is the leading national Community Development Financial Institution (CDFI) for financing resident-owned communities, where it underwrites and services hundreds of pre-development, acquisition, and construction loans. This Service Unit currently leverages Financial Industry Computer Systems, Inc. (FICS) as a mortgage servicer platform. Overall, the Service Unit manages the loan originations, capitalization, and portfolio management of ROCs in our portfolio.
- *Operations.* Provides support for the entire organization, network, and ROC leaders through process and system management, project management, human capital management, and communications and marketing. Systems managed include Monday.com, Box.com, PolicyMap, Zoom, Slack, Paylocity, and Salesforce. There may be interest in identifying ways to leverage Monday.com, Box.com, and Slack in the infrastructure of a new website and marketing website template.
- *Finance and Accounting.* Management of all ROC USA's responsibilities as it pertains to finance and accounting.

For this Request for Proposals, the Operations Service Unit will be the decision-maker in the process.

Performance Period and Options to Extend

- a. ROC USA reserves the right to unilaterally exercise the options outlined below without further competition.
- b. The Period of Performance of this contract is from Date of Award through November 2026. The Respondent should provide a fixed rate for the ongoing maintenance expectations as part of the proposal.
- c. ROC USA may require continued performance of any services within the limits and at the rates specified in the Contract. The total extension of performance under this option provision shall not

exceed six (6) months. ROC USA may exercise the option by providing written notice to the Vendor no later than 30 days prior to contract end.

Contract Administration

- a. ROC USA will award a Fixed Price Contract for the initial design and launch phase and switch to an hourly rate for ongoing maintenance.
- b. Modifications to the contract may only be made by the Chief Operating Officer or the Chief Financial Officer. The Vendor shall not comply with any order or request altering the terms of this Contract unless it is issued in writing and signed by either individual listed above. Modifications to the Contract will be deemed effective when countersigned by the Vendor and returned to ROC USA.

Scope of Work

1. Assessment and Audit (optional)

- Conduct a comprehensive audit of the existing website. This includes assessing its strengths and weaknesses, as well as identifying areas that need improvement.
- Analyze website analytics and user feedback to understand what's working and what's not working.
- Review the existing content to determine what can be reused, revised, or retired.

2. Goal Refinement (optional)

- Revisit and refine goals and objectives for the website. Ensure what we've outlined above is what we want to achieve with the redesign.

3. Content Strategy

- Assist in the evaluation of the current content and determine what needs to be updated or rewritten. Identify existing content that needs to be migrated to the new website.
- Provide a plan for content migration, including the transfer of text, images, and multimedia assets.
- Ensure that SEO best practices are followed during content migration.
- Consider restructuring content if necessary to improve navigation and user engagement.

4. Design and User Experience

- Describe the overall design concept, including color schemes, typography, and visual style.
- Work with a team at ROC USA to gather input on the needs and wants of various parts of the organization. These considerations will drive the site's architecture and functionality.
- Lead a design process with ample opportunity for feedback, changes, etc.
- Create a responsive design that ensures an optimal user experience across various devices and screen sizes. Conduct testing on all major browsers for desktop, mobile, tablet, etc.
- Develop a user-friendly navigation structure and sitemap.
- Integrate necessary features and functionalities (e.g., contact forms, search functionality, social media integration).
- Ensure compliance with web accessibility standards (e.g., WCAG) to make the site accessible to all users (auditory and visual challenges).

- Provide content management system (CMS) recommendations and implementation.
- 4a. *Search Engine Optimization (SEO)*
- Implement an SEO strategy to ensure that our rankings and search visibility are not negatively impacted. Determine best practices for a nonprofit organization and provide recommendations (i.e., track backlinks, additional security measures, website speed and performance, SEO audits, content scraper protections).
 - Optimize the website for search engines (e.g., meta tags, alt tags, schema markup).
 - Ensure proper redirects to maintain SEO equity for existing URLs. *Example:* myROCUSA.org is no longer a website that we look to manage and support.
- 4b. *Security*
- Implement security measures to protect the website from threats and vulnerabilities.
 - Regularly update and patch the website to maintain security.
- 5. Data Migration**
- Plan the migration of data from the old website to the new one, including user accounts, databases, and any dynamic content.
 - Ensure data integrity and consistency during the migration process.
- 6. Testing and Quality Assurance**
- Thoroughly test the redesigned website, with attention to both old and new functionalities.
 - Test for compatibility with existing databases and third-party integrations.
 - Address any issues discovered during testing.
- 7. Launch and Transition**
- Plan for a seamless transition from the old website to the new one. This may involve temporary “maintenance mode” page during the launch.
 - Assist in the communication of the launch to stakeholders and users.
- 8. Post-Launch and Ongoing Maintenance**
- Monitor the website closely after the redesign to ensure it meets performance and usability expectations.
 - Gather user feedback and make necessary improvements based on real-world usage.
- 9. Training and Documentation**
- Provide training to our team members on how to use the CMS and make content updates, create new sections and pages, manipulate menus, etc.
 - Update documentation and user guides as needed.
- 10. Ongoing Support and Updates**
- Continue to provide technical support and maintenance, addressing any issues that arise post launch.
 - Plan for future updates and enhancements as necessary.

RESPONSE PROCESS AND GENERAL INFORMATION

The Respondent is solely responsible for thoroughly understanding the RFP and any supporting documentation. By submitting a response in response to this RFP, ROC USA has a right to assume that the Respondent fully understands the RFP specifications and will abide by all terms and conditions of the RFP.

To the extent there are any revisions or additions to the information provided or requested in the RFP, an addendum to the RFP will be provided. Any addendums issued are to be considered part of the specifications to the RFP. If a Respondent fails to respond to any revisions or additions to the RFP, such failure will not relieve the Respondent of its obligation to fulfill the requirements as posted.

Date and Deliverables

The solicitation process for this RFP will proceed according to the schedule below. ROC USA reserves the right to revise any of the time periods listed below and will post all changes by published addendum on the ROCUSA.org career website.

Item(s)	Due Date
RFP Posted	Oct. 3, 2023
Deadline for Respondent Submission of RFP Questions	Oct. 10, 2023
ROC USA's response to Questions Posted	Oct. 13, 2023
Deadline for Submission of Responses	Oct. 24, 2023
Demonstrations conducted, if requested	Oct. 30-Nov. 3, 2023
Anticipated Start Date	Nov. 8, 2023

Proposal Requirements

The Vendor must submit the proposal electronically with their technical and price proposals to DScott@rocusa.org no later than **11:59 p.m. (Eastern) on Oct. 24, 2023**. Subject line should read: Proposal for Website Design.

Each Respondent may submit only one response. If a Respondent submits more than one response, all responses from that Respondent may be rejected.

Proposals will be submitted in two distinct parts: proposal and price. Proposals must respond to each of the requirements in these sections, providing all requested information. Proposals that merely agree or disagree with the requirements will not be considered responsive.

Rejection of Responses and Cancellation of RFP. Issuance of this RFP and/or receipt of responses does not constitute a commitment on the part of ROC USA to award a Contract. ROC USA maintains the right to accept or reject any or all responses and to cancel this RFP, re-issue a subsequent solicitation, and/or remedy technical errors in the RFP process if ROC USA, in its sole discretion, considers it to be in the best interests of ROC USA to do so. The decision of ROC USA in this regard shall be conclusive.

Cost Incurred. Respondents understand that issuance of this RFP in no way constitutes a commitment by ROC USA to award a Contract or to pay any costs incurred by a Respondent in the preparation of a response. The Respondent is responsible for any expense related to the preparation and submission of its response.

No Obligation of ROC USA for Discussion of Responses with Respondents. ROC USA reserves the right to select one or more qualified Respondent(s) to this RFP without providing any Respondent with an opportunity to present or discuss its response.

Proposal Elements

The purpose of your proposal is to demonstrate the qualifications, competence, and capacity of the Respondent and proposed staffing to undertake the engagement described. The response should contain sufficient information to assure ROC USA of its completeness.

1. **Cover Letter.** Include a point of contact name, address, telephone, and email address. The cover letter should briefly describe the qualifications, as well as briefly describe any exceptions your Company takes to the RFP's scope, terms, conditions, and required deliverables.
2. **Past Performance and Solutions-Oriented Approach.** The Respondent should demonstrate their past performance based on the objectives listed above (Improve Online Presence, Enhance User Experience, Increased Brand Awareness, Improved Website Management, and Marketing Website Template). The Respondent is expected to provide detailed explanations on how their solution addressed each item. Specific examples and screen captures should be used to demonstrate capabilities. It would be helpful to understand with each example the audience, intended purpose, actual outcomes, and data analytics to show impact of that approach.
3. **Technical Approach and Methodology.** The Respondent will provide a detailed description of the technical approach and methodology to the requirements found in the scope of work. The Respondent should address, but not be limited to the following:

General Overview

- Provide a detailed project timeline, including key milestones and deadlines. The final website should be ready for launch in late Q423 or early Q124.
 - Describe key differentiators of the approach as it relates to implementing a solution on time, within your proposed budget, and ability to meet the needs of ROC USA.
 - Describe how you shift from one phase to the next on your preferred implementation methodology.
 - Describe any unique tools, techniques, or methods that you use.
- Describe ROC USA's roles and participation you are estimating in your proposal.

Assessment and Audit (optional)

- Describe your scope and strategy for this approach.

Goal Refinement (optional)

- Describe your scope and strategy for this approach.

Data Migration

- Describe your scope of data migration services and approach on how the services will be provided. Detail the scope of data to be converted.
- Describe the roles and responsibilities between your Company and ROC USA related to data conversion activities.

Training and Documentation

- Describe the training offered and indicate your experience and best practices.
- The Respondent should provide an overall description of their training methods, including a general timeframe.
- The Respondent must list the nature and level of training to be provided in each of the following areas: administration training and technical training.

- Respondent should describe their process for ensuring that a transfer of knowledge occurs back to ROC USA during implementation such that staff can support and maintain the application in the most proficient manner once the implementation is completed.
- Describe what documentation (user guide, technical guide, training guide) is available on the system proposed and any related costs.
- Describe what types of documentation you anticipate developing during the course of the project.

Testing and Quality Assurance

- The Respondent should describe their recommended approach to testing that is anticipated for the project. Describe any type of assistance you anticipate from ROC USA to complete testing.

Ongoing Support Services

Specify the nature and conditions of any post-implementation support options including:

- Telephone Support
- Help Desk Services (Service level agreement for your help desk)
- Toll-free support line
- Online knowledge base
- Maintenance programs and options with associated pricing.

4. Management and Staffing Plan. The staffing plan should identify key project personnel and provide their resumes for evaluation. The resumes should describe their qualifications and relevant experience that would be assigned to the project.

The management staffing plan should include the following:

- Organization Structure
- Ramp-up Plan
- Key Project Personnel

5. Exceptions, Variances, and Deviations. If the Respondent finds it impossible or impractical to adhere to any portion of these requirements or scope of work, it should be stated in the proposal, with all deviations grouped together in a separate section.

6. References. The proposal should provide a description of 3 recent not-for-profit websites developed of similar size, scope, and complexity to the scope of services that your Company has completed in the last 3 years.

7. Price. The price proposal should be submitted in a separate file and must include prices for the entire period of performance. This price proposal must address any assumptions you made when developing your responses.

Evaluation Criteria

ROC USA intends to conduct a fair, comprehensive, and impartial evaluation of all responses received in response to this RFP using an evaluation committee. Each member of the evaluation committee will independently evaluate each response responsive to this RFP. Evaluation committee members may seek, obtain, and consider the opinions of other committee members or subject matter experts.

The successful Vendor will present evidence of both technical skill and a proven record of accomplishment in providing the required services. ROC USA may not select a provider of services or a group or association of providers or award a contract for professional services based on competitive bids submitted for the contract or the services but will make the selection and award: 1) based on demonstrated experience and qualifications to perform the services; and 2) for a fair and reasonable price.

The evaluation will be evaluated in three parts, with an optional demonstration.

- Past Performance and Solutions-Oriented Approach (40%)
- Technical Approach and Methodology (50%)
- Demonstrations, if applicable
- References (10%)

ROC USA will make an award to the Respondent(s) whose proposal(s) represents the best value for ROC USA, considering both cost and non-cost factors. ROC USA may, upon its discretion, establish a competitive range of qualified proposals for award consideration. ROC USA will not conduct discussions and/or negotiations with Vendors not in the competitive range and those Respondent(s) will not be considered for an award.

Selection of the successful respondent would be based on an evaluation of all information provided in the response and at the sole discretion of ROC USA. All Respondents will be notified in writing of the outcome of the selection process.

FINANCIAL TERMS AND CONDITIONS

Maximum Contract Amount. ROC USA's maximum liability to the Contractor, including consideration for the full, satisfactory, and timely performance of all its duties, responsibilities, and obligations, as set forth in the Contract or arising out of any performance, shall not exceed (amount to be determined at the time of Contract award) for the initial Performance Period beginning on the Effective Date. The Contractor will not be compensated for services performed before the effective date of the Contract. The Contractor shall have no entitlement to payment of the Maximum Contract Amount.

The Contractor shall monitor all fees to ensure that the amount of each new invoice added together with all previous invoices during the current Performance Period will not exceed the Maximum Contract Amount for the Performance Period. The Contract shall provide thirty (30) calendar days advance notice to ROC USA if the cost of services is anticipated to exceed the Maximum Contract Amount for the Performance Period. Any increase(s) in the Contract amount for the Performance Period shall require a written Contract amendment executed by the Parties, that specifies the new Maximum Contract Amount for the Performance Period. The total of all such increase(s) should not exceed 20% of the original amount determined for the Performance Period.

Contract Issuance. ROC USA shall issue an executed Contract, or amendment as applicable, as written notice for all Contract authorizations for the purchase of services specified in this request. No authorization for the purchase of any services is provided until such Contract or, if applicable, amendment, has been fully executed by the Contractor and ROC USA. Upon notice from ROC USA that a Contractor or amendment, if applicable, has been properly executed, the Contractor shall identify the proper personnel to receive direction from ROC USA, to manage the work being

performed, and to act on behalf of the Contractor. The Contractor shall ensure that its personnel, or authorized designee, is available for consultation with ROC USA.

Delivery. All deliverables under the Contract shall be made in accordance with the Contract requirements listed in this request. No substitutions or cancellations shall be permitted without prior written approval from ROC USA. The Contractor shall keep ROC USA advised at all times of the delivery status of services to be provided. If the Contractor foresees problems, delays, or adverse conditions that may prevent the Contractor from meeting requirements, the Contractor shall give timely written notice to ROC USA that explains the reason(s) for the delay and proposes an alternate delivery for ROC USA's approval. ROC USA has the right to accept or reject the proposed alternative delivery in its sole discretion.

Invoicing and Payment. All invoices for services provided shall be submitted to ROC USA on a timely basis. Any invoice that does not comply with the minimum requirements stated in this section may not be considered valid and may be subject to rejection and/or return to the Contractor. Upon the request, the Contractor must submit to ROC USA any additional documentation or explanation that may be required to support or document the requested payment under the Contract. Each invoice presented must include Contract name; the name and division of the ROC USA contract; report for the services provided under this Contract; and date, description of each service and the dollar amount attributed, and if applicable, the number of hours associated with each service.

The Contractor shall submit itemized invoices for all services completed, delivered to, and accepted by ROC USA, per the Contract requirements. Invoice amounts shall be made payable to the Contractor at the address on file and/or with the wire transfer instructions indicated in the Contract.

Invoices and payment inquiries shall be submitted to:

Nicholas Salerno
Chief Operating Officer
6 Loudon Road, Suite 501, Concord, NH 03301
nsalerno@rocusa.org

Restrictions on Reimbursement of Expenses. Because all costs of services and expenses are expected to be included within the Contractor's proposal, and ROC USA expects the number of physical project site inspections and/or required travel will be minimal, ROC USA will generally not reimburse Contractor for any expenses incurred in the performance of services. However, ROC USA may, in its sole discretion, authorize the reimbursement of certain unanticipated expenses in accordance with the following:

Pre-Approval Required. The Contract may only be reimbursed for actual expenses that are pre-approved in writing by ROC USA. Contractor must provide ROC USA with a written justification to substantiate how any expenses proposed for pre-approval are reasonable and necessary for the performance of required services under the Contract and could not have been reasonably anticipated as part of the fees set forth in the proposal.

Contract Monitoring. The Contractor's performance will be monitored regularly as work is performed in accordance with the terms and conditions of the Contract. Monitoring activities may include, but are not limited to:

- Inspection of services, prior to acceptance, to ensure Contract compliance.
- Performance review and project planning meetings held to review timeline and project status.

Records Retention. The Contractor shall maintain adequate records to support its charges, procedures, and performances for all work relating to the Contract. Records shall be maintained by the Contractor and made available to ROC USA and authorized representatives during the Contract Term and thereafter until the later of the expiration of: seven (7) years from date of final payment by ROC USA for the services provided under the Contract; or seven (7) years from date of final completion of any audit, dispute, litigation, or the settlement of claims arising out of such performance, or costs or items to which an audit exception has been taken.

Selection of the successful respondent would be based on an evaluation of all information provided in the response and at the sole discretion of ROC USA. All Respondents will be notified in writing of the outcome of the selection process.

ROC USA reserves the right to reject all proposals. If all proposals are rejected, ROC USA may undertake the services by such means as it deems suitable. ROC USA further reserves the right to waive any requirements on a case-by-case basis in connection with the preparation and submittal of proposals.