REQUEST FOR PROPOSAL (RFP)

Website design, development, and integrated CRM system

LoopChicago.com

Issued by Chicago Loop Alliance

Submit questions by:

Wednesday, October 23

RFP Submission Deadline:

Friday, December 13

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INTRODUCTORY SUMMARY

[Chicago Loop Alliance](#) (CLA) is requesting proposals from individuals or companies to provide services to lead and execute a website development project that includes discovery, research, minor brand style refresh, website development and design, and content migration. Equally important, the project requires sourcing and integrating a new seamless customer relationship management (CRM) system that will also work as an association management platform, while also including donor tracking, events management, communication tools, and payment processing. This site and related platforms will replace the current site at LoopChicago.com and backend systems, which are no longer a viable option moving forward due to infrastructure issues.

Qualified applicants will have significant experience leading and executing website development and design projects and working with other vendors if necessary to integrate new CRM systems and related research as needed.

The ideal solution(s) will significantly improve CLA's ability to manage members, donors, and event attendees, as well as provide stimulating content to the larger consumer audience.

COMPANY OVERVIEW

LoopChicago.com represents three entities that work together, Chicago Loop Alliance, Chicago Loop Alliance Foundation and State Street Special Service Area #1-2015.

Chicago Loop Alliance

CLA leads the community by creating and supporting inclusive programs that attract people and investment to the Loop. As a 501(c)(6) business organization, CLA represents Chicago's most dynamic mixed-use district—the Loop—and advocates for the largest central business district in the U.S. outside of Midtown Manhattan. The Loop's neighborhood boundaries are the Chicago River (north and west), Ida B. Wells Drive (south), and Lake Michigan (east).

CLA membership consists of over 300 businesses, organizations and individuals, most located in the Loop and downtown Chicago. The organization also reaches a much larger consumer-facing audience through programs, events, and omnichannel marketing. The organization's board of directors and various committees include private, public, and civic leaders invested in the Loop's future.

Chicago Loop Alliance was founded in 2005 following a merger between the Central Michigan Avenue Association and the Greater State Street Council, which was formed in 1929 and consisted of local merchants eager to promote economic prosperity for their businesses during the Great Depression.

Chicago Loop Alliance Foundation

Chicago Loop Alliance Foundation (CLAF) is a 501(c)(3) affiliate organization that pushes the limits of what a downtown can be for its residents, workers, and visitors. The Foundation seeks to enrich the Loop's public spaces through artistic expression and free cultural programing. By building a connection between people and the places they share, Chicago Loop Alliance Foundation hopes to create an inclusive downtown environment that fosters creativity and enhances the Loop's appeal to the people and businesses that are a part of it.

State Street Special Service Area #1-2015

CLA is hired by the City of Chicago as the sole service provider for the State Street Special Service Area (SSA) #1-2015. An SSA, often more common in other cities under a Business Improvement District (BID) model, serves as a local assessment district that funds enhanced city services and programs within a targeted area. The SSA includes all property on both sides of State Street, and some select sections of Wabash and Dearborn, between Wacker Drive to the north and Ida B. Wells to the south. Each year, the State Street Commission—including mayoral appointments with aldermanic support—approves a budget for SSA #1-2015, which is determined by the levy the city collects. The SSA currently provides the largest source of CLA's funding. As such, the new website should successfully spotlight State Street businesses.

Scalable services

The SSA contract provides the majority of funding for the services, programs, and events CLA delivers along the State Street corridor. However, CLA activities, projects, and programs

are scalable to a larger geographic area. When warranted, CLA services expand to deliver necessary services over a larger area of the Loop.

Loop-wide Business Improvement District

CLA recently advocated and lobbied successfully to achieve Business Improvement District legislation approval for the State of Illinois. This means in the next few years, advancements could occur to create a Loop-wide Business Improvement District that CLA might service, which could expand or replace the more limited State Street SSA. The new website and systems should be flexible enough to accommodate an expansion of the amount and geography of businesses served if/when the potential change occurs.

THE PROJECT

Project context and background

Chicago Loop Alliance (CLA), State Street Special Service Area (#1-2015) and Chicago Loop Alliance Foundation last explored a major website development and design RFP process in 2017 for LoopChicago.com. The site was designed and developed by TimeZoneOne and launched publicly in 2018. Chicago Loop Alliance marketing staff currently manages, edits and updates most aspects of the website through SilverStripe, the Content Management System (CMS). TimeZoneOne still serves as the primary developer for the site under the direction of the CLA's marketing team as needed for major design updates, maintenance, and bug fixes, which occur often.

The nature of Chicago Loop Alliance's website is more complex than some other industries due to the unique needs required to integrate and constantly update hundreds of Loop business listings, events, and promotional deals. When developed, part of the chosen design required a custom-built platform (T.O.M.) to integrate the content from a separate Customer Relationship Management (CRM) platform. The Application Programming Interface (API) built to make those integrations work has caused technical issues since the beginning, and never fully operated in the optimal manner. Given the age of the site, the backend platform is now reaching the end of its lifespan, and the developer has recommended building a new site, as they no longer plan to update the system CLA's site currently runs on. This will cause major problems and will eventually cause our website to not function properly, which has already begun to occur.

Relatedly, CLA's current association management software and CRM solutions do not meet the organization's needs and have long needed an upgrade, which will also prove helpful to integrate properly with the new website. Due to this integration, these two projects will happen in tandem.

The new CRM solution must include seamlessly integrated tools for membership management, event management, ticketing, donations, fundraising, communications, contact management, reporting, analysis, website integration, user experience improvements, accessibility functionality, payment processing, and security and data privacy controls. The CRM solution must fully integrate with the website and greatly exceed and improve the current functionality.

Multiple CLA teams have met and begun research regarding this issue (Marketing, Community Engagement, Membership, and Development), and have shared their findings with other teams (Administration, Finance, Operations, and Events), as this project will affect and hopefully improve outcomes and efficiencies for the entire organization. CLA's Marketing Committee, a group of 16 marketing, media, and communications professionals across various industries in the Loop, including website design, also discussed the project at length during their May 2024 committee meeting, providing insightful feedback and recommendations.

These recommendations were given to CLA's board of directors as well as the State Street Special Service Area Commissioners in June, and both governing bodies agreed with the recommendations and approved the project.

Success metrics

- Increased CLA website traffic (pageviews, users, sessions, engagement)
- Increased website traffic directed to the websites of Loop businesses listed as partners and/or members on CLA site, including SSA businesses
- Increase number of people coming to the Loop and the length of time they spend in the neighborhood
- Increase positive perception of Loop neighborhood
- Increased investment in the Loop
- Higher search engine rankings
- Website and portal process that exceeds peer competitors and current user experience (See peer organization types later in this document)
- Improved UX for end user, as well as members, and partners, across website, portal and related platforms
- Improved UX for CLA staff, across website, portal and related CRM platform(s)
- Seamless integration of systems and platforms with website
- Reduced need for ongoing development and bug fixes
- Upgraded integration of emerging technologies and trends

Project scope, process, goals, and vendor requirements

Planning, strategy, and implementation

- Successfully lead the research, discovery and recommendations process for website development project of LoopChicago.com, including a plan for updating CLA's current internal systems structure, CRM, association management software, and integration of other disparate systems for events, fundraising, membership, omnichannel marketing, contact management and payment processing into a more cohesive platform that functions optimally with website. See appendix for list of "Current CLA platforms and their associated uses"
- Research sites and trends of similar business types, peers and competitors
- Thoroughly identify and understand needs of CLA staff and involved stakeholders
- Research performance of current CRM-related tools and website including key components, pages, and audiences
- Execute market research of CLA's current audiences and site behavior
- Refresh CLA's brand style slightly, likely just color and font style adjustments, in order to create cohesion with new recommended website styles and all other brand materials. Some current staff suggest to potentially update one or both of CLA's primary brand greens to the blue associated with their existing Everyone's Neighborhood campaign. See appendix for current style guidelines and Everyone's Neighborhood materials
- Identify and implement a user-friendly association management software/CRM system that will combine membership management, event management, fundraising management, communication tools, payment processing, CRM integration, and website integration with enhanced and increased ease of use for internal staff. See CRM section for more details.
- Ensure recommended website integration with suggested association management software/CRM system will ensure success for years to come and fulfill the unique needs required to integrate and constantly update hundreds of Loop business listings, events, and promotional deals to the live CLA website with approval systems for staff to be alerted of new content before/when it posts, discussing IP and safety implications of options
- Advise team on additional tools and features available to improve the member experience
- Create suggested timeline with specific goals for each step of process

CRM and related system(s) structure needs

- The ideal solution would combine all backend system needs described below into one cohesive solution with minimal additional platforms or disparate interfaces. Other proposed solutions with minimal fragmented elements are also welcome if strongly suggested:

  - **Centralized data and contact management**: Identify or develop a CRM system that features unified customer profiles for all contacts, not just members, to store comprehensive information (contact details, communication history, purchase history, preferences, and notes) with easy data accessibility across departments. The system should enable effective contact management through segmentation based on criteria such as geography and customer behavior, allowing for tailored marketing and sales efforts. Additionally, include functionality for activity tracking to log all customer interactions (calls, emails, meetings) to maintain a complete record of touchpoints.

  - **Communication Tools**: A communications platform for sending news, event invitations, and updates, with the ability to segment contacts based on various criteria for targeted communications. Automation of communication workflows, such as welcome emails for new members or reminders for upcoming events, and the option to send SMS notifications for important updates and reminders are crucial.

  - **Membership Management**: A centralized database to store and manage member information, including contact details, membership status, and history. The system should support different membership tiers with specific benefits and pricing, automated reminders and processes for automatic renewals, and provide a secure online portal for members to update their information, access resources, and engage with the community; at this time, our current portal provides very limited ways of how members can interact with each other. The system should also have features that manage prospective members and donor tracking (donor codes/membership codes). The platform should connect with the public-facing website seamlessly, so members can easily edit their business listings, event listings, and promotional deals (Loop Deals) with an option for staff approval before posting. We encourage recommending ideas and features that will enhance the member experience.

  - **Ticketing and Event Management**: An event registration system that includes payment processing and confirmation emails; an event calendar to display upcoming events with details and registration links; tools to track attendance and participation; and automated post-event surveys to gather feedback from attendees. We would also like to choose which events are publicly displayed and which are private events.

  - **Fundraising and Donations**: A system to track donations, pledges, and donor information, with tools to create and manage fundraising campaigns, including goal tracking and reporting. Automated generation of tax receipts and thank-you letters will enhance donor and member engagement.

  - **Reporting and Analytics**: The ability to generate custom reports on membership, events, donations, and other key metrics, along with a real-time dashboard to monitor key performance indicators (KPIs) and track progress towards member and donor goals. Tools to export data for further analysis or integration with other systems are also necessary.

o **Integration Capabilities**: Seamless integration with the CLA website to display member information, events, and other relevant data, multiple payment gateways for processing membership fees, event registrations, and donations. Needs to have compatibility with QuickBooks.

o **User Experience and Accessibility**: An intuitive and easy-to-use interface for both staff and members, with a mobile-friendly design to allow access from smartphones and tablets. Compliance with ADA standards to ensure accessibility for all users is also important.

o **Financial integration:** Seamless processing of payments both directly through the website and the member portal. The system must enable automated data synchronization between the CRM and our financial platforms, ensuring accurate and real-time reporting, invoicing, payments, and reconciliation processes. Key requirements include PCI compliance for secure handling of payment data, compliance with financial regulations, and a user-friendly interface for the external user and internal teams. The ideal solution will enhance efficiency, reduce manual errors, and scale with organizational growth. The tool must be able to process payments for fundraising, membership dues and event fees, and have the capability to deposit to more than one bank account to support and delineate between the 501(c)(3) and 501(c)(6)

o **Security and Data Privacy**: Encryption of sensitive data both in transit and at rest, role-based access controls to ensure only authorized users can access certain information, and compliance with relevant data protection regulations (e.g., GDPR, CCPA) are critical for protecting user data.

Website development and design

- Develop and design an attractive website with the top priority of serving a consumer audience (visitors, workers, residents, students, and tourists) and encouraging them to explore the Loop neighborhood's many offerings and attractions. Site should also work equally as well for corporate audience needs, enhancing the abilities for a heightened member experience, as described in audience section of this document
- Propose design deliverables and process
- Incorporate successful components of current site and backend systems, while improving and updating areas in need of innovation
- Reduce and refine the content and navigation of the site to make it less sprawling and simpler for staff and member business representatives to keep current, while maintaining/updating key existing components ("In the Loop" news center, basic company information, research and reports, events calendar, member listings, explore options, and/or other key findings from research)
- Create an intuitive and painless user experience for end user and backend user
- Optimize site for all platform types (mobile, desktop, etc.)
- Encourage website user to also explore and follow CLA on social media
- Develop the site using best practices that align with current and emerging trends across devices, exploring the possible use of technologies like conversational messaging and AI, while avoiding outdated or soon-to-be outdated approaches.
- Integrate an automated and interactive option for conversational messaging interface feature(s) the public can use to explore the Loop, create personal itineraries and/or ask questions about the neighborhood and CLA with dynamic clear responses that aren't overwhelming to the user.

Options for this feature could include robust filtering and internal taxonomy; AI interface(s); and/or alternate recommendations from the developer

- Utilize structured schema or similar approach so CLA programs, events, and job listings display optimally through search engines
- Ensure new site meets ADA Compliance WCAG 2.2 Level AA, unless you recommend a different level. Also explain what type of reporting tools you'll use to qualify the work and make sure the site stays ADA compliant once it's actively managed by staff including training staff on how to do so effectively
- Ensure all pages from old site and QR codes link seamlessly to the new site equivalents
- Ensure that new site maintains and improves search engine ranking and SEO standards
- Integrate a new association management software/CRM platform to seamlessly interact with site in order to display Loop business information, events, and promotions
- Ensure ability to smoothly process donations and payments directly from the website
- Ensure ability to register for events through the website
- Create a site structure that includes an improved solution for digital website version of CLA's marketing campaigns, like Holidays in the Loop, potentially better integrated with the print elements of the campaign. See appendix for examples of printed pocket guide and kiosk maps. The ideal solution also integrates more seamlessly with member offerings; provides less backend manual work for staff to create and launch the campaign; and makes the digital site more cohesive with the other aspects of the campaign from a design perspective (map integration, style choices, etc.).
- Include necessary cookie approval elements, currently a pop up
- Include contact name, email, and phone number acquisition tool, currently a pop up
- Identify and implement a user-friendly CMS that CLA's staff can manage and update daily without assistance from experienced web designers or developers

Integrations and content migration

- Fully assess and execute content migration needs from current website and CMS to new system, working directly with Time Zone One as/if necessary
- Lead execution and migration of current CRM content, association management software and disparate platforms into new cohesive solution, including solutions for event registration, fundraising/development tracking, member portal, member billing and payments, donation payments, events calendar, promotion submissions, member listings, member applications, and more. See appendix for additional needs compiled by staff
- Please note that the consolidation and integration of CLA's systems and a new association management software/CRM solution to work seamlessly with the website is just as important if not more important than the website design itself
- Compile and integrate all existing and new member and SSA business listings and detail needs into new platform and site
- Review platform options compiled by CLA staff, but also be prepared to suggest and recommend other new solutions, not already discovered by staff. See appendix for working list. Please note these suggestions have not been explored in detail and many may not be suitable or best for this project. We want the vendor to bring expertise and clarity to this conversation
- Propose CMS and CRM and explain benefits of these recommendations
- Recommend other technologies that will be used
- Recommend web languages to be used
- Propose strategy for internal transition
- Provide internal CMS and CRM training
- Provide strategy for roll out to Members

Deployment
- Create launch strategy with additional information on hosting & ongoing maintenance with additional information on the operating system of the intended server
- Prior to launch, the vendor will be required to present the website and CRM and launch strategies to the marketing committee and/or CLA Board of Directors for final feedback and approval

Post-Deployment
- Provide suggestions for hosting and maintenance packages post-launch. If offering the service, provide details and cost of recommended services

Additional specific CLA needs from agency:
- Dedicated project manager and primary point of contact and a secondary point of contact with full involvement and detailed knowledge of the project
- Bi-weekly project meetings and/or status updates for duration of design/build
- Ample time built into the production timeline for internal CLA stakeholder review
- Written estimates on cost, time, and any change orders (no surprise invoices)
- Confidentiality on all proprietary information and exclusivity on any custom development paid for by CLA

Key decision maker
- CLA Director of Marketing & Communications

Other involved stakeholders and decision makers
- CLA President & CEO
- CLA Director of Community Engagement
- CLA Director of Development
- CLA Marketing & Communications Manager
- CLA Marketing Committee

Content

The ideal vendor will lead and facilitate a plan to fully assess the site's current content and how it will transition best to a new site structure. Interested vendors should thoroughly explore and understand the current structure of LoopChicago.com.

Chicago Loop Alliance's website content currently includes options for guests to "explore" the Loop, including hundreds of business listings that showcase suggested places to eat, drink, shop, stay and more, as well as promotional deals from Loop businesses. Member and SSA business listings include business details, descriptions, maps, and links to other businesses, attractions and transit nearby. The "Loop Deals" page serves as an important tool for the user to access special promotions from CLA's partners. The "Loop Events" section provides details and content about CLA events (Sundays on State, Gala, Annual Meeting, etc.), as well as event calendar items from Loop partner and member businesses. Content for all three of these sections ideally originates from the member/partner directly through an integrated portal.

"In the Loop" serves as a news center where CLA staff creates editorial content for the public, shared through various communications channels. If these pieces could integrate with interactive Loop maps

for each activity or business mentioned, that would be ideal. Integrating video and social media crossover options is also encouraged.

Under "Do Business," "Research and Resources" serves as a pivotal location for CLA's research, data, reports, and studies. All of these reports must migrate over to the new site.

The "Join" section provides details on CLA membership and encourages new prospects to join CLA as a member.

The site also contains a media section regularly updated with press releases. Other pages hold background information about CLA, CLAF, and SSA history, ambassadors, mission, values, past and current programs, staff, and board. A "career" page exists for CLA to post open jobs.

"Loop Advisories" serve an essential function for alerting locals about potential impacts of construction, events, protests, and other project news that could affect day-to-day business in the Loop.

Ideally, the new site will reduce and refine the site's content and navigation, to make it less sprawling and simpler for staff and member business representatives to keep current, while maintaining/updating key existing components. All this must be accomplished while still honoring existing key components of the site and achieving high SEO results of current webpages. CLA welcomes and encourages a fresh and outside perspective on new ways to achieve these goals.

Primary audiences

Consumer audience

Over 800,000 users visit LoopChicago.com annually, generating 1.3 million pageviews. The site serves as a central resource for visitors, residents, workers, and tourists in the Chicago Loop, helping them plan itineraries and encouraging repeat visits. The potential audience includes 40,000 residents, 400,000 workers (34% of the city's workforce), students from 11 Loop-based colleges, and many of the 50 million annual visitors to Chicago. With nearly 3 million residents in Chicago and over 9 million in Chicagoland, the site's audience has many potential subsets.

Corporate audience

Over 1,000 Loop stakeholders regularly interact with Chicago Loop Alliance from a member and/or partner perspective. This group often more closely interacts with the Loop and CLA from a professional perspective. They represent SSA property owners along State Street and 300 member and partner businesses in various industries throughout the Loop, including attractions, restaurants, hotels, cultural institutions, office buildings and professional services. They may use the website and portal to update their business listings, calendar events, and promotional offerings, as well as access resources, reports, CLA event information (Gala, Annual Meeting, etc.) and register for events.

Relevant peer organization types, industries and competitors

LoopChicago.com serves a variety of purposes and functions, as do CLA, CLAF and SSA #1-2015. Relevant similar industries to explore for potential inspiration for this project include:
- Chambers of Commerce
- Special Service Areas (Chicago and elsewhere)

- Business Improvement Districts (BID). Language varies per country and state, and may also be known as: Community Improvement District (CID), Special Improvement District (SID), Neighborhood Improvement District (NID), Property-Based Improvement District (PBID), Local Improvement District (LID), Metropolitan Improvement District (MID)
- Member-based business organizations
- Destination Marketing Organizations (DMO)
- Charitable non-profit 501c3 organizations
- CLA's closest local peer competitor in terms of size and scope in Chicago is The Magnificent Mile Association, but their structure is still quite different.

Budget and payment process

While we are not disclosing a specific budget for this project, we ask that respondents submit a comprehensive and competitive cost proposal that will adequately cover completing the project scope. Proposals should include a detailed breakdown of all costs, including any one-time fees, recurring costs, licensing fees, maintenance, and support. The cost will be a significant factor in our evaluation process, and we encourage vendors to present cost-effective solutions that align with the scope of the project and long-term value. A final contract price will be negotiated prior to contract execution.

The payments will be broken down into separate installments at completion of each stage of the process with half of the total to be paid throughout 2025, and the remaining balance paid upon successful site launch and completion in early 2026. Exact timing, payments and installment amounts will be based on a mutually agreed upon schedule in advance and should include the full scope of this RFP. No surprise invoices.

CLA reserves the right to transition to a different vendor at any point in the project due to unsatisfactory performance, evolving project needs, or if alternative solutions are identified during the discovery phase that better align with the project goals. In such a circumstance, the current vendor will be compensated fairly for the completed work up to the point of transition, as per agreed terms.

PROJECT TIMELINE

- **Request for proposal** (RFP) release date: **October 11**
- **Vendor Q&A**: Submit questions via email **by October 23**
- **Pre-proposal conference: October 31** – Interested vendors are invited to attend a meeting where all pre-submitted vendor questions will be answered by staff. Attendees will have the opportunity to receive clarifications regarding the RFP. This session will be held in person in Chicago with other potential vendors to ensure all parties have access to the same information. Vendors must **RSVP in advance** (see link in "Submission Process" section) to confirm your planned attendance and include the number of attendees and their names
- **RFP deadline: December 13**
- **Finalist notification and presentations: January 2025**
- **Vendor application review and selection process: January-February 2025**
- **Final vendor selection: February 2025**
- **Project launch: February 2025**
- Phase 1 – Discovery, planning, and strategy
    o Target completion date: (TBD)
    o Agency leads research into CLA's website, current internal platforms, audiences, brand, site behavior, including meeting(s) with CLA staff to fully understand their needs
    o Agency suggests solutions, platforms, and structure for new website, CMS, association management software/CRM and adjacent platforms, as needed
    o Goal – platforms and structure determined and selected, reviewed, and approved by all stakeholders
- Phase 2 – Site blueprint
    o Target completion date: (TBD)
- Phase 3 – Design
    o Target completion date: (TBD)
- Phase 4 – Build & Launch
    o Target date: (TBD)
    o Fully functioning test site in a dev environment delivered 3-4 weeks prior to launch for review & QA
- **Goal: Launch fully functioning site publicly in February 2026**

PROPOSAL SUBMISSION DETAILS

Proposal Structure

Section 1: Firm's Profile
1. Name, address, contact person, phone, email, and website
2. Company W9
3. General background
4. Service offerings

Section 2: Project Approach
1. Describe where you heard about the project
2. Describe the approach your firm would use to meet the expectations of CLA and the results of this approach
3. Include the project management systems and communication tools that your firm would use to complete process
4. A project timeline which includes major milestones and deliverables within each milestone
5. Sample visual mockup of your suggested approach

Section 3: Project Deliverables
1. List the main objectives and final deliverables of each project phase: discovery, design, development, and deployment. Please include thorough explanations of how you aim to achieve each of the requirements listed in the 'Project scope, process, goals, and vendor requirements' section on this RFP including, but not limited to the following:
    a. What are the proposed design deliverables?
    b. What CMS do you propose using and what are the benefits?
    c. What solution(s) do you recommend for CLA's association management CRM upgrade and other platform needs? And what are the benefits?
    d. How does the proposed CRM solution integrate seamlessly with the proposed CMS?
    e. What other technologies will be used?
    f. What web languages will be used?
    g. How will you ensure the proposed systems will endure and sustain for many years without unnecessary additional development work overtime? What is the expected life cycle of your proposed solution(s)? Please note that disparate systems with intricate APIs as part of the process have caused issues for upkeep and maintenance in the past.
2. Explicitly state any deliverables that are not included or that will need to be provided by CLA

Section 4: Ongoing Website Maintenance
1. Post-launch website hosting and maintenance fees should be broken down as a separate, optional service from the website design and development project.
2. Describe capacity of the team to provide ongoing website maintenance and support, including size of team, time zones, and ability to provide 24-hour technical support and assistance when/if needed in emergency situations
3. If you are not offering this service, please provide the company information for the service you would recommend instead, including the details above if known

Section 5: Project Team

     1. Description of the roles of each team member assigned to the project

     2. Technical backgrounds and relevant work experience of project team members

     3. Information on sub-contractors for the project, if any

     4. Vendors are encouraged to demonstrate their commitment to diversity and inclusion by providing details of relevant certifications, partnerships, or initiatives. Diversity and equity will be important factors in the selection process, and businesses owned by underrepresented groups, including Woman, Black, Latinx, Veteran, LGBTQ+, and Disability-owned businesses will have their contributions recognized as a valuable part of the evaluation.

Section 6: Related Project Experience

     1. State experience in completing websites, association management software and CRM-related projects

     2. Provide examples of projects completed by firm, including projects most similar to the needs stated in this RFP

     3. Description and visual samples of creative examples used in development and design of websites

     4. Description, scope, and size of completed projects including destination and/or tourism portfolio items, various CRM platform integrations, and/or association management software

Section 7: References

     1. Provide three to five references on similar projects including the year of project

Section 8: Project Costs

     1. Provide a detailed breakdown of all project fees and expenses and when payments are due

     2. Project fees & expenses should be submitted as a separate document from the rest of the proposal

     3. Post-launch website hosting and maintenance fees should be broken down as a separate, optional service from the website design and development project

Evaluation / Selection Process

CLA will select the firm that best meets the organization's needs, with price being only one factor that CLA will consider to make this determination. Finalists may be asked to give an in-person presentation of their proposal to key decision makers, board members, and/or the Marketing Committee. CLA will award the contract to the vendor based on the following key evaluation criteria:

1. Applicant's capability and history in the facilitation, leadership and development of a comprehensive website and CRM solution for similar clients and/or comparable services
2. Quality of the proposed service to include unique systems, current best practices, and approach to the development of website, which reflects the unique characteristics and needs of CLA and the audience we serve. Best practices include navigation, structure, systems, visual design, functionality, integrating new technologies and overall UX optimization
3. Ability to demonstrate the technical competence of the project team to perform the work
4. Past record of performance as determined from available information and the qualifications and experience each team member will bring to the project
5. Demonstrate capability under current workload and resources available to perform the work within the project schedule
6. Vendor locality: A local agency is a plus, however vendors outside of Chicago will still be considered
7. Vendor commitment to diversity, inclusion, equity and accessibility, including representation in company ownership and project team
8. Technical Expertise: Ability to meet technical requirements and previous experience with similar projects
9. Portfolio: Quality and relevance of previous work
10. Interpersonal Skills: Team collaboration, communication skills, and ability to collaborate effectively with our staff. We highly value respectful and positive communication
11. Proposal Quality: Clarity, completeness, and professionalism of the proposal
12. Cost: Cost-effectiveness and value for money

Submission Process

Questions

RFP questions should be emailed to: Marketing@ChicagoLoopAlliance.com. Questions are due by **Wednesday, October 23, 2024.**

Pre-proposal conference: October 29. Vendors must **RSVP in advance here** to confirm your planned attendance and include the number of attendees and their names.

Proposal Submissions

Proposal **submissions should be both received by mail and emailed by December 13** in the following formats:

By Email:
- Project fees & expenses should be included as a separate attachment from the rest of the proposal.

  Email to: **Marketing@ChicagoLoopAlliance.com**
  Subject Line: **CLA Web and CRM Proposal - [Respondent Name]**
  Proposal Attachment Title: **CLA Web and CRM Proposal - [Respondent Name]**
  Costs Attachment Title: **CLA Costs - [Respondent Name]**

AND

By Mail:
- Project fees & expenses should be sealed in a separate envelope than the rest of the proposal.

  Mail four copies to:

  Chicago Loop Alliance
  Attn: Ariella Gibson
  55 W. Monroe Street
  Suite 2660
  Chicago, Illinois 60603

Accessibility and accommodations

Chicago Loop Alliance is committed to ensuring equal opportunity for all vendors. If you require any accommodation to participate in the RFP process, please contact us at Marketing@ChicagoLoopAlliance.com or by phone 312-782-9160. Email is preferred if possible. We will work with you to provide the necessary support and ensure accessibility.

Terms & Conditions

1. **Vendor's Understanding of the RFP**
   In responding to this RFP, the vendor accepts full responsibility to review and understand the RFP in its entirety, and in detail, including making any inquiries to the CLA as necessary for clarification and information. Once the award has been made, failure to have read all the instructions and specifications of this RFP shall not be cause to alter the original contract or to request additional compensation. Further, CLA reserves the right, at its sole discretion, to eliminate from further consideration any proposal the CLA deems to be substantially or materially unresponsive to the requests for information contained herein. Such elimination shall be at no fault, cost, or liability whatsoever to the CLA.

2. **Costs**: This RFP does not oblige CLA to pay for any costs, of any kind whatsoever, that may be incurred by a vendor or any third parties, in connection with the RFP response. All RFP responses and supporting documentation shall become the property of CLA, subject to claims of confidentiality in respect of the RFP response and supporting documentation.

3. **Intellectual Property**: Any vendor in receipt of this RFP is prohibited from using any intellectual property of CLA including, but not limited to, all logos, registered trademarks, or trade names of CLA, at any time without the prior written approval of the CLA, as appropriate.

4. **Vendor changes and compensation terms**: CLA reserves the right to change vendors at any stage of the project for any reason, including, but not limited to unsatisfactory performance, evolving project needs, or if alternative solutions are identified during the discovery phase that better align with the project goals. In such a circumstance, the existing vendor would be paid for the portion of work already completed.

APPENDIX

1. CLA's current brand style guide and logos
2. Everyone's Neighborhood sample art and design
3. Holidays in the Loop – 2023 materials (brochure, State Street kiosks, design style)
4. Holidays in the Loop website
5. CLA's current platforms and software relevant or potentially related to this project:
   - SilverStripe
     - Current website CMS, includes custom T.O.M. interface, custom designed by TimeZoneOne which pulls content from ChamberMaster through API
   - ChamberMaster
     - An older platform provided by the company that now produces GrowthZone and MemberSuite
     - Functions, but not ideally, as CLA's association management software and CRM for CLA member and partner contact info, business details, and event listings that feed content to current website through an API integrations with SilverStripe and T.O.M.
     - Holds contact data for over 300 current members businesses and over 1,000 current individual members (mostly employees of those businesses)
     - Holds additional contact data for previous (inactive) members, likely hundreds or thousands of additional archival names and data
     - Connects with Constant Contact by sending some contact list updates daily, but the options are extremely limited
     - Processes payments for membership billing linked to CLA's Quickbooks
   - Constant Contact
     - Current email marketing platform used to send hundreds of emails per year in different formats to several different audience types and segments, primarily Consumer newsletters, Corporate/member newsletters, Loop Advisories, invitations, event, and program announcements and surveys
     - Holds contact info for over 82,000 individuals, including consumer audience acquired through event registration, website sign up, and other acquisition means
     - Integrates member contact info from ChamberMaster for email communications
     - Receives lists from an Eventbrite integration on a manual push basis
   - Eventbrite
     - Used for registration for some of CLA's free events, primarily Sundays on State, LoopedIn member networking events and member Marketing Lab events
     - Sends event lists to Constant Contact through an integration, but requires a manual push
   - OneCause
     - Used for registration and donations for CLAF events and programs that include payment, primarily Annual Meeting and Annual Gala
     - Staff manually exports data to Quickbooks, funds are directly linked to bank account(s)
   - QuickBooks
     - Used by financial department for all bookkeeping and integrated directly with payment processing aspect of ChamberMaster. This element will remain the ultimate financial system and is likely non-negotiable. The proposed payment system(s) will need to be compatible with connecting to two separate accounts in Quickbooks

- o SurveyMonkey and Typeform
  - Auxiliary platforms used for surveying. We have no issues with these platforms. Just noting them here in case any of the proposed solutions come with their own advanced surveying features. This is not a critical element
6. CLA staff rough notes from brainstorming, which lists some, but not all, desired site, and platform needs
7. Potential platforms recommended to CLA by other sources. These platforms are not necessarily from groups similar to ours and have not been explored at all in depth. This list should not limit the recommendations of the submitting agency. Many of these may not be the right fit for this project for differing reasons. We hope the selected agency can help facilitate reducing the list and suggest other solutions that might work better if appropriate.