

US Chess Federation RFP Questions and Responses for Phase 2 Redesign and Development

NOTE: Questions asking the same or similar things were edited for clarity.

Q: Can US Chess provide the 2013 Web Presence report?

A: The report can be found here: <http://www.uschess.org/docs/forms/wsac-finalreport.pdf>

Q: Is US Chess intending to move all payment processing functionality to Stripe or are there business requirements that would prevent that?

A: We have not made any long-term decisions regarding our payment processing functionality.

Q: Does the webstore currently integrate with any inventory, fulfillment, or order processing systems?

A: The membership webstore and the TD/Affiliate Support Area are both integrated into our membership system. There's no 'inventory' to deal with but we do send new and renewing members email and a membership card in the mail. For national scholastic events we do have a team room reservation system that might benefit from inventory control procedures, currently it's managed by hand.

Q: Does the current RFP include a review of the business and project objectives? Is US Chess interested in a project evaluation?

A: Please review the RFP to find the project objectives.

Q: Does the RFP include integration with a powerful analytics platform to better inform future decision-making?

A: Information on our analytics can be found here-
<http://www.uschess.org/datapage/awstats.uschess.mar17.html>

Q: Can US Chess provide access to existing analytics when appropriate?

A: Information on our analytics can be found here-
<http://www.uschess.org/datapage/awstats.uschess.mar17.html>

Q: Does US Chess expect that the Agency will undertake the administration of all existing web applications and hosting platforms?

A: No.

Q: Is there a technical liaison at US Chess that can provide perspective on historical decision-making and the status-quo?

A: Yes.

Q: How many US Chess personnel rely upon the website for their daily work?

A: We have four staff members who regularly make updates to our site.

Q: Where does most of the traffic to US Chess websites come from? Organic search, other sites, paid media, social?

A: Most traffic comes from members, coaches and parents. We do get some traffic to the home page from people who search for information on chess.

Q: Does US Chess have plans to create and launch campaigns that the website(s) will support?

A: Yes.

Q: Are the current objectives in the RFP in order of importance/immediacy? If not, are some objectives more important than others?

A: Objectives are not listed in order of importance or immediacy.

Q: Do you currently manage and operate all sites?

<https://new.uschess.org/home/>
<http://www.uschess.org/content/view/13127>
<https://secure2.uschess.org/webstore/member.php>
<http://www.uscfsales.com>

A: We do not manage or operate www.uscfsales.com.

Q: Does the RFP include all the urls listed above?

A: The RFP does not include www.uscfsales.com.

Q: Who is responsible for Archiving of the current site into the existing archive site. archive.uschess.org. US Chess or Agency?

A: US Chess will work with the selected vendor to determine the archiving process.

Q: Will the US Chess project team be responsible for evaluating current site content to determine which content should be removed, rewritten or new?

A: US Chess will work with the selected vendor to evaluate and revise content.

Q: Will the US Chess project team be responsible for writing new content?

A: US Chess will work with the vendor to create new content.

Q: Will there be one point of contact the US Chess will appoint to manage the communications between Agency and US Chess?

A: Yes.

Q: Who are the stakeholders at US Chess who will have input in the site redesign?

A: US Chess stakeholders are listed in the RFP.

Q: How is content managed (store, events, etc.)? Is there a formal process for content publishing? Is player ranking real time?

A: Most editorial web content is managed by our web editor. Player ranking are not real time, but updates to player ratings information are posted several times a day from our internal servers. Some rankings are updated daily, the Top 100 lists are updated once a month.

Q: Is US Chess open to using alternative technologies (such as other than WordPress and phpBB), third party solutions and consolidation?

A: We are open to using alternative technologies, but any changes would need to be justified as a cost-savings. Changes would also need to be justified in terms of ease of use and design functionality for editors.

Q: Are any functions of the bulk email server included within the scope of the project? If so, please clarify.

A: The bulk email server itself is outside of the scope of this proposal.

Q: On page 6, can you describe in a bit more detail the functions of how the site handles opt-in and opt-out transactions with the external bulk email system?

A: Most contact categories are opt out, some are opt-in and a few cannot be opted out of because they are related to specific duties a member chooses to accept, like our Board of Delegates, Certified Tournament Directors and affiliate officers.

Q: On page 6 (middle), to clarify, the secure2.uschess.org site is part of the RFP, but the internal server that handles the bulk email system is not, correct?

A: Yes; secure2.uschess.org is part of the RFP (specifically the membership webstore, the TD/Affiliate Support Area and the Voucher management page.)

Q: What is the typical volume (or peak) of traffic and/or queries (on the db pages) for the site?

A: The member services pages generate about 400,000 hits/month.

Q: Is there any other functionality behind a login (MSA, etc.) that has not been described in the RFP? If so, please briefly describe, or can a test login be provided.

A: MSA is not behind a login, there are some content pages that are only available to someone who has logged in to the website. The TD/Affiliate Support Area has a separate registration/login system (because the Joomla-based login is not secure enough.)

Q: Has a budget been determined for the entire project?

A: Bidders should develop budgets based on the anticipated expenses associated with carrying out the deliverables that are outlined in this RFP. Proposers should provide the best value for this RFP.

Q: Page 6 mentions migration to a WordPress requirement, and I wanted to open dialog as to whether this is flexible or is this an immediate deal-breaker?

A: We are open to using alternative technologies, but any changes would need to be justified as a cost-savings. Changes would also need to be justified in terms of ease of use and design functionality for editors.

Q: Please rate the following on a magnitude of 1(lowest) - 10(highest)

- Ease of Use
- Minimal Errors
- Uptime
- Performance
- Security
- Robust Functionality
- Search Engine Optimization
- Website Communication tools (e.g. e-mail or SMS gateway integration)
- Integration with 3rd party Systems
e.g. Salesforce or Internal Accounting systems
- Training
- Documentation
- Price

A: US Chess will expand upon our priorities in these areas to the selected vendor.

Q: Do you prefer to keep the new uschess.org as a base to improve upon? Or do you prefer to create an all-new design?

A: We prefer to keep the new uschess.org design, but are open to improvements and suggested changes.

Q: Do you have a defined style guide? Do you wish to keep it?

A: Yes; we have no plans to change our style guide at this point.

Q: What list of mobile devices do you require support for?

A: All parts of the new USChess.org need to at least display in proportion and function on mobile devices, particularly smartphones and tablets. For some of the more complex pages, mobile devices may only show a subset of the information on the page or present it in multiple pages.

Q: Are there any expectations of brand identity work as part of this project? If so, what is the scope of this sub-project?

A: We expect the project to create a consistent brand identity presented throughout the site.

Q: Please rate the following on a magnitude of 1(lowest) - 10(highest)

- Ease of Use for Current/former US Chess members, coaches, and parents
- Ease of Use for parents of scholastic members
- Ease of Use for TDs/organizers/affiliates
- Ease of Use for Prospective Members
- Ease of Use for Donors/Prospective Donors
- Ease of Use for Advertisers/Sponsors
- Ease of Use for Casual Chess Players
- Ease of Use for Press/Media
- Ease of Use for US Chess Staff

A: US Chess will expand upon our priorities in these areas to the selected vendor.

Q: What is your averaged and maximum target response time by the server for non-authenticated traffic measured in milliseconds?

A: We have no formalized response time targets.

Q: What is your average and maximum target response time by the server for authenticated traffic

measured in milliseconds?

A: We have no formalized target response times.

Q: What is your averaged and maximum target client load time for non- authenticated traffic measured in milliseconds?

A: We have no formalized target client load times.

Q: What is your average and maximum target client load time for authenticated traffic measured in milliseconds?

A: We have no formalized target client load times.

Q: Besides the front page slider issue mentioned in the RFP, what are the top 10 user experience issues driving this decision to redesign?

A: Additional user experiences issues will be reviewed with the selected vendor.

Q: Do you have defined UX flows for your existing sites?

A: No.

Q: How many hits do you receive in a month to your webstore?

A: The webstore handles around 60,000 transactions a year.

Q: How many products do you have?

A: We sell memberships, not products. We also handle registrations to national events, we run about 5 national events a year, plus some postal chess tournaments through this system. The total number of registrations in a year is in the 8000 range. We process rating fees in our TD and Affiliate area.

Q: How many product categories do you have?

A: There are around 30 different membership products.

Q: How many orders are placed in a month on average?

A: Additional information about our orders will be shared with the selected vendor.

Q: What is your sales volume (inUSD)?

A: Additional information about our sales volume will be shared with the selected vendor.

Q: Which countries do you wish to sell to? Please indicate if for virtual products, physical products, or both.

A: We sell subscriptions and memberships to other countries.

Q: Is Stripe the only payment processor that you wish to use?

A: No, we are open to changing processors based on a cost savings analysis.

Q: Or do you require multiple processors?

A: We do not require multiple processors.

Q: Do you perform any marketing campaigns that integrate tracking with your webstore?

A: Not at this time.

Q: How does the US Chess web store fit into this project?

A: The webstore is where about 75% of memberships are processed, another 20% come through the TD/Affiliate Support Area and the rest are handled by mail or phone.

Q: How does it integrate with the main site (if at all)?

A: secure2.uschess.org does not integrate with www.uschess.org; it is separate.

Q: Do you wish to support recurring billing?

A: Possibly, though for PCI compliance purposes we do not currently do this.

Q: Do you require IPN support with your payment processor?

A: No, but we are open to exploring the possibility.

Q: What reports do you need to run?

A: We run daily reports including memberships sales, tournament entries, rating reports, and donations.

Q: Are there any marketing tools to implement on the website? If so, what are they?

A: We use Google Analytics.

Q: Are there certain pages that are prime candidates for A/B or multivariate testing? (e.g. home page, user registration, or landing pages)

A: We are open to exploring this possibility.

Q: What analytics tools do you use?

A: Google Analytics for WordPress-based data; we also generate monthly reports from Apache web server log data for other pages.

Q: How large is your e-mail marketing list?

A: Additional information about our marketing lists will be shared with the selected vendor.

Q: How many marketing e-mails do you send a month?

A: Additional information about our email activity will be shared with the selected vendor.

Q: How many transactional e-mails do you send a month?

A: Additional information about our transactional emails will be shared with the selected vendor.

Q: How much growth do you anticipate in the above three questions?

A: We anticipate growth in the number emails and marketing/donor lists.

Q: What is the current feature-list for the MSA?

A: Additional information on MSA can be found in the RFP.

Q: Do you wish to add any additional functionality to the MSA? If so, what and when?

A: We will review additional functionality to MSA with the selected vendor.

Q: What are the primary drivers for rebuilding your event calendars?

A: We will share additional information about rebuilding our event pages with the selected vendor.

Q: What is the current feature-list for the TLA?

A: Additional information on TLAs can be found in the RFP and Website Advisory Report.

Q: Do you wish to add any additional functionality to the TLA? If so, what and when?

A: Yes, some of the additional functionalities we would like to add to the TLA section is described in the Website Advisory Report.

Q: What is the current feature-list for the Webstore?

A: See the RFP and Website Advisory Report.

Q: Do you wish to add any additional functionality to the Webstore? If so, what and when?

A: We are open to exploring additional functionality to the Webstore.

Q: What is the current feature-list for the TD/A application?

A: Some of the features for TD/A application can be found in the Website Advisory Report.

Q: Do you wish to add any additional functionality to the TD/A application? If so, what and when?

A: Some of the additional functionality we hope to add to the TD/A application can be found in the 2013 Website Advisory Report.

Q: What are the current drivers for rebuilding the member database?

A: We will share additional details about rebuilding our member database with the selected vendor.

Q: What are your requirements for the member forums?

A: We currently have two categories of forums, those visible to the public and those only visible to registered and logged-in members. The phpbb3 package supports private messaging between members.

Q: Do you require that the forums be native in the system? Or may it run off of a separate, integrated application?

A: We are open to continuing to use a separate system, but the integration with member logins (to access members-only data) is key.

Q: What do you require to “modernize” your newsletter management system?

A: We hope to redesign the email template to be more consistent with our brand and make the process of creating email blasts easier to manage.

Q: Do you require integrations with any 3rd party systems? (E.g. just visual appearance? Or replacing the MTA, admin tools, analytics tools, and visual appearance?) e.g. your CRM or ERP

A: The webstore and TD/A need to be tied to our membership processing system. Much of the data for the member services area comes from our internal database, so it needs to be updated throughout the day.

Q: Do you require a Web Services API to be exposed to any third party systems?

e.g. for submission of tournament results or accessing rating information

A: We are open to the possibility.

Q: If so, do you require UAC?

A: User access (for things like bandwidth limitation) would be helpful.

Q: If so, do you require billing for API access?

A: We have not actively considered charging for API access.

Q: What aspects of the site do you wish to be managed internally?

A: We would like to be able to update existing pages and create new pages using pre-designed page templates.

Q: Please give a list with several examples of items you would expect NOT to be able to manage to illustrate the line between both of them.

A: We would not expect to design new page templates or fix bugs.

Q: What are your custom search experience requirements?

A: The custom search should allow search within the entire site, or specific areas of the site (i.e.- News on WordPress, which currently has a search, or MSA, or All of the Above). The custom search experience should be trouble shot so that for instance, someone doesn't get dozens of results of limited interest (i.e.- MSA data where the player in question is not the main subject) before more prominent results (i.e.- their MSA page/articles about them)

Q: What types of publishing tools do you need?

e.g. publishing approval, scheduled publishing

A: We would like to explore both publishing approval and scheduled publishing.

Q: What types of voter registration transactions run?

A: Additional information about the voter registration process will be provided with select vendors.

Q: Who is responsible for additional content production?

A: US Chess has a team to create new content for the US Chess news section of our site.

Q: Who is responsible for sourcing images or videos?

A: Our publications department and digital editor source images and videos.

Q: Do you already have all of your asset libraries organized?

A: We have our digital library of images organized by event.

Q: What content needs to be migrated over and above static content and forums?

A: The Webstore, MSA, TD/A area, voucher redemption system, BINFO system, Club Directory, TLAs.

Q: How many pages of static content do you have?

A: We have around 36,000 rendered pages actually written in HTML under /var/www/html that end in .htm or .html and another 1500 that end in .pdf. Many of these files are very old and date back to the website we had before 2005. This does not include Joomla-rendered pages, or php scripts that query a database (like the MSA pages),

Q: Why was WordPress chosen for the USChess.org platform?

A: WordPress was chosen because it was easier for staff to make updates and changes to the site on a day to day basis.

Q: How is the pre-seeded Wordpress admin panel insufficient for your requirements?

A: Additional information is not available at this time.

Q: Is WordPress the required CMS platform for this project? Or are you open to other CMSs that may be a better fit?

A: We are open to using alternative technologies, but any changes would need to be justified as a cost-savings. Changes would also need to be justified in terms of ease of use and design functionality for editors.

Q: Is it possible to receive a series of demos of all of the different areas of the site, both functionally and technically? If so, please provide several dates that this may happen. This will greatly help in accurate scoping and budget estimates.

A: We do not have demos available at this time.

Q: In your proposal you reference designing, optimizing or migrating large data sets as a criteria. None of your individual data-sets specifically referenced and quantified in your Proposal are currently over 1M records. How do you define a large data set? (e.g. 1-10m records, 10-50m records, 100M-1B records, or 10B+ records)

A: We have around 90,000 current members, but over 900,000 current and former members in our historical records. We process about 10,000 tournaments a year, representing around 700,000 rated games. Our records go back to late 1991.

Q: How many database rows, across all systems you potentially desire to port in this first phase, do you currently have (not counting rows in cache tables)?

A: See above.

Q: How do you see your data-sets changing over time?

A: This is something we hope to explore in depth with the selected vendor.

Q: What is the current minimum, maximum, and mean traffic for all of your websites by year, month, day, and hour?

A: More information on our traffic can be found here:
<http://www.uschess.org/datapage/awstats.uschess.mar17.html>

Q: Do you know of any periods of time that have extreme spikes in user traffic?

A: We experience extreme spikes in traffic during our national events.

Q: Who would you prefer to be responsible for end-user testing?

A: We are open to exploring this possibility.

Q: Do you have an internal methodology for classifying bugs with your infrastructure? If so, what is it?

A: We do not have a formalized methodology for classifying bugs.

Q: What is your expected response time to bugs during testing and after go-live for the different severity levels? (e.g. low, medium, high, critical)

A: We do not have a formal expected response time to bugs during testing or after go-live.

Q: Do you currently use multiple environments (e.g. dev environment, testing environment, and production environment) with a git repository to manage code deployments?

A: Yes.

Q: Do you have a predetermined test-pool to submit the site to?

A: No.

Q: Would you like to have third-party testing performed with full documentation to be submitted for review by US Chess and Contractor?

A: We are open to exploring this possibility.

Q: Do you host directly with AWS?

A: Yes

Q: If so, who is responsible for maintaining the servers?

A: We are working with consultants to maintain the servers. We are in process of identifying a third party consulting firm to assist in this area.

Q: If so, what is your current upgrade schedule for your servers and the applications installed?

A: The upgrade schedule is still being determined.

Q: Do you have your infrastructure documented?

A: Yes, part of the infrastructure is documented.

Q: If so, would you provide a map illustrating your server infrastructure?

A: A map may be shared with the selected vendor at a later date, but is not currently publicly available.

Q: Is your current infrastructure currently documented in compliance with PCI requirements?

A: Yes, since all website-based credit card transactions are handled either through Stripe or through Authorizenet's DPM, so credit card processing is not handled on our website.

Q: What is your current back-up schedule and locations (on premise, in cloud, off-site location)?

A: Additional back-up and recovery plans will be shared with the selected vendor.

Q: What is your current disaster recovery plan?

A: Additional back-up and recovery plans will be shared with the selected vendor.

Q: How frequently do you test your back-ups and disaster recovery plan?

A: Additional back-up and recovery plans will be shared with the selected vendor.

Q: Do you wish to change either of these? If so, in what way?

A: We are open to reviewing our back up and recovery plans with the selected vendor.

Q: Does your organization already define employee's duties by roles? If so, what level of adoption is there?

A: We do define and separate employee duties by roles.

Q: Do you require PCI Compliance?

A: Yes.

Q: Are you currently PCI Compliant?

A: Yes.

Q: If so, may we review your latest report?

A: Additional reports may be shared with the selected vendor, but are not public at this time.

Q: Is it a priority to have a third party code audit?

A: We are open to exploring this possibility.

Q: Does your organization require proper SOD (Segregation of Duties) for all or some internal employees?

A: Yes.

Q: Do you require TFA? If so, do you require conditional assignment by role?

A: We are open to exploring this requirement.

Q: What types of audits do you require?

A: Additional audit information may be shared with the selected vendor.

Q: Do you have any federated identity requirements?

A: Additional security requirements may be shared with the vendor at a later date.

Q: Do you have any SSO (Single Sign On) requirements?

A: Additional security requirements may be shared with the vendor at a later date.

Q: You mentioned that user-level security considerations may require a DB design. Please elaborate.

A: Additional user-level security considerations may be shared at a later date.

Q: Do you have any advanced database security requirements?

A: Additional database security requirements may be shared at a later date.

Q: Please share any unique security requirements you may have considered since submitting the RFP?

A: Additional security requirements may be shared with selected vendors at a later date.

Q: What internal personnel manage and edit the website currently?

A: We have a four staff members who edit and manage the website regularly. We also have consultants that provide more specialized technical assistance.

Q: What are their skills and available time allocations?

A: Their skills vary on their responsibilities and tasks.

Q: Do you anticipate and/or wish to change the internal personnel who manage the website or content? If so, what are the anticipated and/or desired changes?

A: We have no anticipated changes but are open to recommendations.

Q: What areas are most important for US Chess to be involved in? e.g. design review and selection or site hierarchy

A: We anticipate that different stakeholders will be involved in different areas of the design.

Q: How does the committee desire to be involved?

A: The Committee serves as in an advisory capacity.

Q: How frequently does the committee desire digitally delivered reports?

A: The frequency of reports will be determined during the contracting phase.

Q: How frequently does the committee desire reports and working sessions in person?

A: In person reports are not required.

Q: Does your committee work on a common mindset? Or does it grow through a synthesis of dissenting ideas?

A: The mindset of each committee member varies.

Q: How frequently do you desire project status calls? (e.g. once a week)

A: The frequency of project calls will be determined during the scheduling process.

Q: How frequently do you desire status reports to be delivered? (e.g. once a week)

A: The frequency of status reports will be determined during the scheduling process.

Q: How frequently do you desire project reports to be delivered? (e.g. once a month)

A: The frequency of project reports will be determined during the scheduling process.

Q: What other project artifacts do you require and how frequently?

A: Additional requirements will be at a later phase.

Q: How many US Chess team members will be present on each status call?

A: The number of team members will vary.

Q: Have you already nominated an internal champion for the project?

A: US Chess will identify a project manager in the coming months.

Q: Who are the stakeholders in this project?

A: Stakeholders are listed in the RFP.

Q: Who are the motivated stakeholders in this project?

A: Stakeholders are listed in the RFP.

Q: What is the process to approve a project change order?

A: The process to approve changes will be addressed during the contracting phase.

Q: How important is it that the consulting firm has extensive experience in the chess world?

A: Extensive experience relating in the chess world is not required. Bidders unfamiliar with chess are encouraged to learn more.

Q: How important is it that the consulting firm has extensive experience in how tournaments and chess ratings work?

A: Extensive experience relating to tournaments and ratings is not required. Bidders unfamiliar with the tournaments and ratings are encouraged to learn more.

Q: How important is it that the consulting firm has other chess projects in their portfolio?

A: Experience working with other chess-related websites is not required. Bidders unfamiliar with the US Chess website and services are encouraged to learn more.

Q: After this project, do you intend to continually refine the website? Or just focus on any applicable bug-fixes?

A: We anticipate needing to continually refine the website in the long-term, but short-term expect to focus on bug fixes.

Q: What are you on-going security requirements?

A: Additional security requirements will be shared with the selected vendor.

Q: What is your ideal role for a development company after go-live?

A: We would like to the development company to be available on an as needed basis.

Q: Is there a desire for Consultants to remain on project for further marketing efforts?

A: Further marketing efforts will be reviewed following the project completion.

Q: What were the current costs for development of the original back-end systems and the first phase of this new project?

A: Additional information about the development costs are not being released at this time.

Q: What are current monthly costs?

A: Monthly costs may be shared with the selected vendor.

Q: What is your rating criteria and methodology for evaluating Proposals?

A: Proposals will be evaluated by staff and the Website Advisory Committee. A group of 3-5 finalists will be selected to participate in telephonic interviews.

Q: Is there a preference between hourly work or flat rate projects?

A: No.

Q: Is there an incumbent agency who did the work for US Chess in Phase 1 of the Redesign and Deployment Project?

A: Yes.

Q: Are they taking part in the Phase 2 RFP process?

A: The RFP process is open.

Q: How many agencies have expressed interest in submitting proposals for Phase 2?

A: We have received questions from 14 different vendors.

Q: Will you be shortlisting 2-3 agencies for in-person presentations to US Chess as part of the selection process?

A: A group of 3-5 finalists will be selected to participate in telephonic interviews.

Q: What is the ideal start date for US Chess for Phase 2?

A: The ideal start date would be as soon as the contracting process is complete, preferably in June or July.

Q: Is US Chess looking to combine its three separate environments into WordPress or keep some environments separate?

A: This has not been decided yet.

Q: In addition, combining all the databases into one or keep some databases separate?

A: Website membership database is all secondary data refreshed from our internal server.

Q: If separate can we get a breakdown of which environments will be kept separate?

A: This has not been decided yet.

Q: Can requirements be provided for all the current functionality & features to be migrated into WordPress?

A: See the RFP and 2013 Website Advisory Report.

Q: Is the Member's Service Area being migrated into WordPress or kept separate?

A: The plan is to move the MSA to WordPress at this time.

Q: Can you tell us more about the member service area and please provide a list of all the features of the

Member's Service Area?

A: See the RFP and 2013 Website Advisory Report.

Q: Is user-level security/access new and how many types would there be? If new and on three separate environments that may add complexity.

A: In addition to staff/site management, we would anticipate two or three levels of public access: Member, registered non-member, public. Some member privileges may be limited by age.

Currently the TD/Affiliate area uses a separate login/password; this could be integrated into WordPress.

Q: Database Compatibility: it sounds like US Chess is open to redesigning its databases into one, can you please confirm if that is correct.

A: If necessary.

Q: Are you hoping to keep secure2.uschess.org and just re-designing it?

A: There are advantages to having transactions handled on a separate server, i.e. keeping www.uschess.org and secure2.uschess.org separate.

Q: Or would you like your partner to help migrate it and its functionality to WordPress?

A: We are open to the possibility.

Q: If migrating, can we please have a list of the functionality?

A: See the RFP for additional information on the functionality.

Q: Will it be ok to combine all donations/member signups through one unified E-commerce experience? For example, using their current Donation Stripe merchant for payment processing.

A: Yes.

Q: Can we please request a list of all the search functionalities? For example, Affiliate Search List, Club Directory Search

A: Search functionalities include: affiliate search, club search (could be integrated into affiliate search), member search, tournament history search, upcoming tournaments search.

Q: Are you hoping as part of Phase 2 there is work with www.uscfsales.com ?

A: We do not anticipate work with www.uscfsales.com as a part of Phase 2.

Q: It looks like this may already be in WordPress is that correct?

A: This is a partner site and is not managed by US Chess.

Q: And is US Chess currently using an E-commerce plugin for this?

A: No, both the webstore and TD/A were internally developed.

Q: What exactly are your hopes/plans for the Forum?

A: In addition to seeing the forums integrated into the overall design and brand of the site, we would like to explore the possibility of allowing users easily upload PGN files, so users can share games more easily. We would also like to explore the ability to like/dislike posts, and perhaps have a threshold as well (you get +1 for a like, -1 for a dislike, and any posts scoring, say, -5 or more are automatically hidden).

Q: Is US Chess open to re-skinning the current Forum since it is currently running on PHPBB3 an open source forum software?

A: Updating to more current version of PHPBB3 is desirable, whether the forum authentication system can be integrated with, for example, a WordPress authentication system is unclear.

Q: Or are they wanting to convert the current forum into WordPress as well? For example, using a WordPress forum like BBPress

A: We are open to exploring the possibility, converting existing structure and porting data may represent challenges.

Q: Can you please share more information as to which content will be archived and if there is a certain date range in which that would apply to that archiving?

A: We would like to archive all content.

Q: Is US Chess currently using any type of Ecommerce on the new WordPress site?

A: STRIPE for donation processing.

Q: Does US Chess want to move the pages from the Amazon servers to WP Engine?

A: We want to move the pages from WP engine to the Amazon servers.

Q: As well as combining the Amazon MySQL Database with the WP Database?

A: Not sure if this is feasible/desirable.

Q: What is the current US Chess traffic breakdown across devices (desktop/tablet/mobile)?

A: Information about analytics can be found here:

<http://www.uschess.org/datapage/awstats.uschess.mar17.html>

Q: What is US Chess' appetite for a user-centered approach?

A: We are open to considering a user-centered approach.

Q: Is there an interest in conducting a couple rounds of usability testing? If so, can you provide users representative of each user group?

A: We are open to considering rounds of usability testing. User representatives will be shared with the selected vendor.

Q: Is there an interest in us delivering a high-fidelity prototype(s) instead of design documentation?

A: We are open to exploring that possibility.

Q: Is the assumption that all US Chess objectives will be achieved with existing content or is there an interest in content creation to address some of the more aspirational goals such as inspiring people to donate, persuading people to join, or expressing the benefits of chess?

A: We anticipate that additional content will need to be created.

Q: Is there an interest in your agency partner providing a content marketing strategy that would call out how to use social media more productively to achieve goals of promotion, empowerment and life enrichment?

A: This has not been decided yet.

Q: Do you currently have AMS or CRM? If so, which system(s) are using?

A: We don't use a formal AMS or CRM program (or at least not a generalized one), there are many aspects of our membership system that would also be part of either an AMS or a CRM package, but there may be things we do that an AMS/CRM would not normally do (many of them associated with our complex membership structure and with things like the tournament and ratings systems) and there may be things an AMS/CRM would routinely do that we're not currently doing. (More contacts with members, for example, including better donation solicitation and donation record-keeping.)

Q: In addition to Stripe, what tool(s) are you using for payment processing?

A: Authorize.net.

Q: What tool(s) are you using for email newsletter?

A: The email newsletter was internally developed.

Q: Regarding the requirement for "introduction of a new module where games can be replayed on the page" - is this an interactive tool for members to play against each other, or is this more of a video replay module?

A: This would be more of video replay module. We do have an easy to use and well branded game player, but there are definitely some potential improvements in functionality, including video replay.

Q: What do you like about the new WordPress CMS? Any pain points?

A: Overall, staff find it extremely easy to use and intuitive to figure things out. Usually they can just look around the CMS to figure out how to fix something (or consult the training manual). Some of our staff do not feel as comfortable as they would like creating new pages or altering existing pages due to the customized design.

Q: What CMS were you using prior to WordPress?

A: Joomla

Q: Why did you switch?

A: We were looking for a CMS that would be easier for staff to update and make changes on a day to day basis.

Q: What made you choose WordPress?

A: WordPress was chosen because it did not require the technical skills required when working with Joomla.

Q: Do you have analytics tracking on the site?

A: We use google analytics

Q: Which tool(s) are you using?

A: Google analytics.

Q: Will all content need to be migrated to the new site?

A: We do not anticipate moving all content to the new site.

Q: You reference having event assets back to 1991, will those all need to continue to be publicly available?

A: Yes

Q: Do you have any additional information about the requirements associated with the donor database?

A: Not at this time.

Q: Provide historical and current strategies used to publicize and promote the US Chess website.

A: Documented strategies are not available at this time.

Q: Please provide the latest sitemap and wireframe if available.

A: A proposed sitemap is available in the 2013 Website Report. This sitemap will most likely be revised.

Q: If UX studies have been completed on the current site, please provide the results.

A: No UX studies have been completed at this time.

Q: Are you willing to provide analyst-access to website analytics (Google Analytics and AdWords) so we may better understand volume of site visitors, time on site, entry/exit points, etc.?

A: Analytics can be found here: <http://www.uschess.org/datapage/awstats.uschess.mar17.html>.

Q: The RFP mentions that WordPress is the selected CMS – have you had any challenges with WordPress that we should be aware of?

A: Some of our staff do not feel as comfortable as they would like creating new pages or altering existing pages due to the customized design.

Q: What are the desired requirements of the custom search experience?

A: The custom search should allow search within the entire site, or specific areas of the site (i.e.- News on WordPress, which currently has a search, or MSA, or All of the Above) The custom search experience should be trouble shot so that for instance, someone doesn't get dozens of results of limited interest (i.e.-

MSA data where the player in question is not the main subject) before more prominent results (i.e.- their MSA page/articles about them).

Q: Describe the functionality required for the new Webstore?

A: The web store must be able to handle all membership types (except those that require external confirmation, like blind and prison members, which have to be handled by staff), tournament registration, preferably membership data updates. It also needs to update internal member records.

Q: Please explain what is meant by “modernize email newsletter management system.”

A: Update the email blast template to reflect the website brand and style guide.

Q: Is the requirement that the existing system is re-skinned?

A: This is a possibility.

Q: Is there additional functionality required of the existing system?

A: Not at this time.

Q: Are we to implement a new system?

A: Not at this time.

Q: With regard to your current membership and benefactor/donation lifecycle funnel, have you implemented a marketing automation strategy? If so, please provide.

A: We do not have an implemented marketing automation strategy.

Q: Please provide access to the current member forums platform.

A: Most of the member forums are open to the public (excluding the US Chess issues forum which requires US Chess membership to log in).

Q: Have there been discussions and even a selection of a new member forum platform?

A: We have not selected a new member forum platform, but are open to exploring the possibility.

Q: Please provide current MSA database design and structure.

A: More information on the MSA database can be found by visiting the MSA section of our website.

Q: What is the current strategy for seeking donations?

A: Additional information about donations will be shared with the selected vendor.

Q: Where are most donations coming from?

A: Additional information about donations will be shared with the selected vendor.

Q: What are some of the current drivers pushing people to the site?

A: Most of our traffic comes from members, parents, coaches and organizers.

Q: Please describe what is meant by “prominently publicize and promote US Chess as a 501(c)(3).

A: The website design should reflect the organization’s new status as a charitable organization, and further its mission of empowering people through chess one move at a time.

Q: Does the budget account for a media investment to prominently publicize and promote the organization?

A: Not at this time, but we are open to exploring this opportunity.

Q: Which plugins have been identified to be implemented into the current site?

A: Additional information about plugins will be shared with the selected vendor.

Q: The RFP references playing online, has this functionality been completed and tested?

A: The RFP references a module to replay (not play live games) games online. We already have an easy to use and branded game player, there are definitely some potential improvements in functionality, including video replay.

Q: If so, which environment has it been created in and is it compatible to mobile OS?

A: NA

Q: Can you provide a test log-in for the team to look at the member services area?

A: MSA pages are open to the public.

Q: How many people do you expect to be involved in the design review and project overall?

A: US Chess staff and the Website Advisory Committee will be involved in the project.

Q: Are there other sites that your team uses as an example of what you like?

A: Other sties will be shared with the selected vendor.

Q: Do you have any kind of voice, tone, style guide?

A: We have a style guide.

Q: Do you have brand guidelines?

A: We have a style guide.

Q: Will there be advanced content workflows and scheduling (editing queues, draft reviews, revisioning, etc.)?

A: This has not been determined yet.

Q: Do you have team members that write copy for the site?

A: We have a digital editor and assistant that write articles for US Chess News.

Q: Is there a need for multiple language support?

A: Not at this time.

Q: Does the client have a preferred Analytics platform, i.e. Google Analytics, Omniture (Adobe)?

A: We currently use Google Analytics.

Q: What systems will the site need to integrate with, i.e. Salesforce, Marketo, etc.?

A: Additional systems will be shared with the selected vendor.

Q: Do you have access to an image library or will we need to secure images (photography) for the project?

A: We have a digital image library.

Q: Once the site is done, will you be assuming maintenance of the site moving forward?

A: Yes, although we anticipate some maintenance will be outsourced.

Q: Does the client have "Security" protocol that our developers will have to adhere to?

A: Additional security information will be shared with selected vendor.

Q: Will there be special accessibility requirements (ADA) beyond the industry standard level?

A: Not at this time.

Q: Are there any other similar requirements that need to be accounted for?

A: Not at this time.

Q: Will there need to be supporting mobile/tablet apps developed?

A: Not at this time, but we are open to exploring the possibility with select vendors.

Q: Will email templates need to be created in the new brand look and feel?

A: Yes.

Q: Will paid media landing page templates need to be created in the new look and feel?

A: Yes.

Q: What plugins for are currently used for WordPress?

A: Plugins will be shared with the selected vendor.

Q: Are there any caching systems currently in place?

A: Yes, we use CloudFlare for caching, though some directories are exempted from the cache because of problems with posting updates.

Q: Is a using a specific WordPress theme being used? How customized is it?

A: Additional information about the WordPress site will be shared with the selected vendor.

Q: Role-based security was mentioned. What kind of security mechanisms are in place right now?

A: Additional security information will be shared with the selected vendor.

Q: What system is currently in use?

A: There is not real calendaring system in place, the list of upcoming TLAs is managed using an app that Joan uses to keep track of TLAs, send out proofs, bill for them, etc. It builds html pages of upcoming events by state, not in a calendar format.

Q: Does it need to integrate with other calendaring systems, such as Exchange?

A: We are open to exploring that possibility.

Q: How are payments processed?

A: Information on how payments are processed can be found in the RFP.

Q: Do any of the parts of the site require PCI compliance?

A: Yes.

Q: Is there an existing search platform, such as Solr?

A: Aside from the built-in search engines in WordPress, Joomla, and phpbb3, no.

Q: Social integration is mentioned, to what extent?

A: Social integration will be reviewed with the selected vendor.

Q: Signing in with Facebook, etc.? Posting to social media?

A: Social integration will be reviewed with the selected vendor.

Q: Is there an email newsletter system currently in place?

A: Yes