

**REQUEST FOR PROPOSAL**

**DATABASE, WEB & WEB SERVICES**

**INFRASTRUCTURE PROJECT**



**UNITED STATES CHESS FEDERATION**

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## Organizational background

The United States Chess Federation (US Chess) is the official, nonprofit 501 (c)(3) organization for chess players and chess supporters of all ages and strengths, from beginners to Grandmasters, in the United States. US Chess is the only official representative of the United States to the World Chess Federation (FIDE).

Our mission is to empower people, enrich lives, and enhance communities through chess. Founded in 1939, US Chess has grown to serve over 94,000 members and 1,500 affiliated chess clubs and organizations today.

Under the management of a professional staff headquartered in Crossville, Tennessee, US Chess sanctions thousands of tournaments with over 800,000 officially rated games annually. US Chess also awards 25 National Championship titles to both amateurs and professionals, ranging from elementary school students to senior citizens. Over ninety Grandmasters represent the US in major international competitions, including the challenger for the most recent World Championship.

US Chess relies heavily on its information systems to guide its operations and support its distributed membership in all corners of the United States and abroad. This infrastructure RFP is an investment in US Chess operations for the next decade.

## Project background and summary

Several years ago, US Chess decided to engage in a top-to-bottom review and update of its web presence. The review was conducted by a 10-member committee between March and November 2013. In August of 2014, the US Chess Executive Board approved funds to begin this project, and development began in 2015.

The project was envisioned in multiple phases. However, due to financial constraints, the new site was expected to use the existing data structure, including our current membership database. As the project progressed, it became clearer that many of the desired site changes would require significant investments in upgrading the membership database. That redesign project is the foundation from which all other information and web systems will be built. Successful responses to this RFP will consider our needs for data warehousing, website content and multi-layer user hierarchy. An overview of functional areas for the new system is provided below.

This project is envisioned in two phases. This RFP is soliciting proposals for Phase I. However, we are looking for a partner with the vision and capacity to potentially handle both Phase I and Phase II. Therefore, we encourage responses to the RFP that also address Phase II requirements.

US Chess reserves the right to solicit the successful bidder of Phase I for the completion of Phase II without a competitive bidding process, if US Chess is satisfied with the progress in Phase I and the capabilities of the vendor to execute Phase II.

Phase I will deal with the following development activities: database redesign, data migration, data warehousing, and deployment of native CiviCRM modules (particularly for website content management and multi-layer user hierarchy).

Phase II will deal with the following development and implementation activities: Customization of CiviCRM Modules, Website Redevelopment, Web Services and App Development. Completion of this phase will result in new public and members-only websites, along with redeveloped web services and a US Chess mobile app in support of member activities.

The possibility of a long-term partnership exists as US Chess will have on-going CiviCRM maintenance needs. US Chess is open to working with a team of vendors in order to obtain the necessary expertise for successfully completing this project. One vendor will be the lead project partner with US Chess and will be responsible for any subaward oversight under this contract.

## Project goals

### The goals of Phase I are as follows:

1. Integrate US Chess data stores under CiviCRM.
2. Test and deploy CiviCRM native functional capabilities after database migration.

### The goals of Phase II are as follows:

1. Integrate CiviCRM with public and member-only websites
2. Facilitate simple development of data-driven content.
3. Allows for a single user login to be defined for access to all applicable areas.
4. Permits administration by designated office staff, who likely will not be DBA-level.
5. Provides a fully functioning, feature-rich information system that supports US Chess operational, membership and public stakeholders.
6. Incorporate multi-level user security.

The objective of Phase I is successful development of a database that:

1. Utilizes a standard and widely available/supported database language such as MySQL
2. Provides both pre-defined and user-defined reports
3. Applies hybrid storage solutions leveraging cloud and local data storage
4. Incorporates robust disaster recovery and contingency planning
5. Provides a sustainable, long-term solution for US Chess operational needs.

## Current data warehousing

The current US Chess data warehousing structure is described as follows.<sup>1</sup> We envision bringing as much of this structure as possible under one CiviCRM roof.

### PostgreSQL server

US Chess has a PostgreSQL server that houses our secure membership data, our secure affiliate data, our ratings server, our tournament advertisements, our election data and our accounting data. The secure membership data includes some personally identifiable information (PII).

### AWS

Our main Amazon Web Server instance runs MySQL. It houses our governance data, including archives of Executive Board communication, our WordPress website, our Member Services Area (MSA) web utility, our secure web store, our secure portal for tournament directors and affiliates to submit information related to our rated tournaments (TD/A), and our national event registration system.

### AWS RDB

Our secondary Amazon Web Server instance also runs MySQL. It houses a slimmed-down, “read-only” version of our main membership database in Crossville. AMZN-RDB has a limited number of tables where it pulls updates from the same tables on Gambit. This redundancy is designed to limit the load on Gambit by people using our MSA and TD/A utilities, as these are the most heavily used parts of our web site.

### Office.com

Our email is managed through Office.com.

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<sup>1</sup> A schematic diagram of the existing network is attached as Appendix A.

## Project requirements

This project will require the simultaneous execution of the following requirements, which reflect both current and anticipated organizational needs.

### CiviCRM deployment

There are many types information that need to be managed in this database. We are looking to manage our new database with a single tool that can handle most, if not all, of our functionality. CiviCRM is a well-known constituency relationship management tool that is freely available and used by many nongovernmental organizations that have similar needs to those of US Chess. The successful proposal will demonstrate expertise in integrating existing data stores into a new CiviCRM instance that will include custom fields and reporting.

The successful proposal will consider the various data management needs of the organization, including the security of PII and financial data. At a minimum, this system will need to handle data for individual members, affiliated organizations, organizational accounting, governance, elections, national event registrations and communications (specifically, pre-defined and custom-defined lists for mail and email distributions).

In addition to the need for bringing existing databases under a single instance of CiviCRM, US Chess expects it will leverage all CiviCRM functional area modules. This is a Phase I requirement.

### Integration with CMS

As part of our website redesign project, our advisory committee recommended that our new site be developed in WordPress. As a result, the website at new.uschess.org has been developed in WordPress.

While US Chess is currently positioned to utilize WordPress, the successful proposal does not have to commit to developing through WordPress, though this is the preferred approach. We are willing to consider transitioning to a different CMS package. A primary alternative, for example, might be Drupal 8.

The successful proposal will address CMS integration, preferably by laying out a development plan that calls for MySQL to be used as the database language. This is intended to facilitate the web development that will be a major part of Phase II. The development work is part of Phase I with implementation being in Phase II.

## Single sign-on

US Chess currently has many areas that require separate login/password credentials. We desire to give our users a system where a single login is all they will need to access anything controlled by or through the new membership database. This will require a detailed evaluation of our current data structure, and clear definition of user classes and permissions.

The successful proposal will include time and resources devoted to the implementation of this objective. The development work is part of Phase I with implementation being in Phase II.

## Mobile-optimized and App development

US Chess is actively looking to develop a mobile-optimized web presence, that seamlessly displays on cell phones and tablets with full desktop functionality. This presence will perform equally well in iOS and Android environments. Additionally, US Chess wants to develop a branded app that will allow users to interact with US Chess tournament listings, searchable ratings information, news stories and other content from US Chess, national event standings, and other US Chess content areas. The successful proposal will account for this Phase II objective in its database development plan.

## Webstore/Credit card processing

US Chess has a webstore that is primarily used for processing membership payments. That webstore is hosted in our Joomla! installation, and it processes transactions through Authorize.net. Other credit card payments are processed with a portal that uses Stripe through our WordPress installation. We are looking for an implementation that will let us process all payments through a single merchant processor, using a single webstore solution. The payment processing setup should also allow for the implementation of custom discount codes that can be applied to various items in the store. Additional customization to payment receipts is a desired outcome as well.

The successful proposal will consider a seamless integration of payment processing into its design. The development work is part of Phase I with implementation being in Phase II.

## Accounting integration

US Chess must be able to easily integrate data from all credit card transactions into our accounting system. We are currently using Sage. There is openness to changing the current accounting software. There is existing Quickbooks expertise in house.

The successful proposal should address how financial transactions processed using the new online store would flow and/or integrate with existing or proposed accounting software. The US Chess financial team is open to recommendations for solutions that fully integrate with CiviCRM. This is a Phase I requirement.

## National event registration integration

US Chess currently accepts entries for national chess tournaments organized directly by US Chess through our Joomla! installation, using a customized form-driven tool that creates a new website for every national event. The data received through the tournament entry portal on each tournament website is coded to work with the WinTD pairing program. There is openness to changing the current pairing program.

The successful proposal will address not only the ability to create national tournament websites using a programmatic tool, but also the porting of entry data to a pairing program for tournament directors to use in administering events. The development of this will largely happen in Phase II. However, it must be accounted for in the database design of Phase I. This will almost certainly be customized development.

## Security

This new database installation is expected to be the nerve center of US Chess operations. As such, the successful proposal will address comprehensive security features to safeguard the installation. This includes backup and recovery contingencies, including backup and failover strategies. This is a Phase I requirement.

## Database and Data Standards

The successful proposal will include a commitment to fully document all database and data standards. These include, but are not limited to, object nomenclature, standard abbreviations, compliance related to governance and nonprofit regulations, and data migration between environments. This is a Phase I requirement.

## Accessibility/Compliance

The new website must be compliant with WCAG 2.0 (or most current) standards. Data privacy must be compliant with policies set under the European Union's General Data Protection Regulation (GDPR). The



successful proposal will directly address these imperatives. The development work is part of Phase I with implementation being in Phase II.

## **Analytics**

The successful proposal will include the integration of analytics for the purpose of gathering usage data. These analytics may be either existing APIs from a source such as Google Analytics, or custom development. Existing modules would be preferred, as they would likely be easier to maintain than a custom API. This is a Phase II requirement.

## **AWS**

US Chess anticipates any future web development to take place on a remote AWS (or other cloud) installation, to ensure redundancy and security. This is a Phase I requirement.

## **Forums**

US Chess has a bulletin board powered by phpBB that lives in our Joomla! installation. The bulletin board consists of six discussion forums, as well as a private-messaging module. User accounts are tied to current membership status, and are required to access one of the six forums, as well as private messaging. The forums are maintained by moderators.

US Chess is not wedded to any particular discussion board package. In fact, there are currently no formal decisions about whether or how to incorporate a similar package into this project. However, the successful proposal will account for this possibility with appropriate user attributes. This is a Phase II requirement.

## **Podcasts/RSS feeds**

US Chess is developing podcasts and other material that would be best managed through an RSS feed. The successful proposal will integrate this functionality into the new website. This is a Phase II requirement.

## Collaboration site

US Chess has an active membership that provides input into the governance of the organization. We envision a member environment that provides committees and other subgroupings of the organization to collaborate and communicate within the US Chess online environment. Primary functionality for the collaboration site would include: user access controls (e.g. committee member-only views), in-site discussion forums, calendar features, document repository. The collaboration site could also provide the platform for sharing member-only resources. One tool under consideration would be Atlassian Confluence and Jira to support this functionality. The development work is part of Phase I with implementation being in Phase II.

## Training

Much of the day-to-day interaction and administration of this database will be handled by non-technical staff. Accordingly, the staff will need training on how to perform their job functions in this new environment, as well as how to run reports to extract data they require for those functions. The successful proposal will include provisions for both training sessions and comprehensive user documentation. This is a Phase II requirement.

## Project deliverables

### Phase I

- Database incorporating current data into fields that take full advantage of CiviCRM's functional modules, including any foundational development that is intended for custom CiviCRM implementation.
- Database schema with full relations between tables and full listing of primary and secondary keys.
- User documentation suitable for distribution to non-technical personnel who will interact with the database on a daily basis.
- Other items noted as requirements above for Phase I.

### Phase II

- New USChess.org web presence managed by a CMS that easily incorporates CiviCRM's administration and custom programming capabilities.
- Single sign-on.
- Other items noted as requirements above for Phase II.

## Project milestones

This RFP is designed for Phase I bids. The estimated timeline for Phase I is 11 months after the awardee's start of work. For purposes of this bid, proposed milestones will assume a work start date of June 1, 2019. Project milestones will include the following:

- Completion of discovery process
  - This may involve meetings with US Chess staff, in-depth reviews of current infrastructure, and other means of gathering information as deemed necessary by US Chess and the selected partner
  - The discovery process will last no more than 45 days
- Completion of technical requirements document
- Completion of database design schema
- Completion of development, unit and functional testing
- Internal admin-level training of US Chess staff
- Database goes live
- Development of general user-level training documentation for US Chess to make available via download

## Questions and required information

In your proposal, please include a list of at least four references, work portfolio and estimated budget.

Successful proposals will address the following questions:

- What experience do you have with designing databases for NGOs with existing data stores?
- What experience do you have developing and customizing CiviCRM instances?
- What experience do you have creating user hierarchies?
- What experience do you have integrating Sage or other accounting software with CiviCRM?
- What experience do you have creating custom plugins or functionality at the CMS level?
- What experience do you have with large-scale data migration?
- What experience do you have with integrating non-native functionalities into the CiviCRM platform? If you have experience in any one of the areas outlined above, please describe in detail.

## Contact information and deadline for submissions

Submissions from all interested parties must be received by US Chess no later than **5:00 p.m. Central time, May 1, 2019**.

Submissions may be remitted electronically or by mail to the following contact:

Carol B. Meyer  
Executive Director  
United States Chess Federation  
PO Box 3967  
Crossville TN 38557  
[carol.meyer@uschess.org](mailto:carol.meyer@uschess.org)

Please use "Infrastructure Proposal" in the subject line of any email you send.

US Chess is willing to schedule one-on-one informational sessions with interested bidders to permit detailed inquiries prior to submitting a bid. Any prospective bidder interested in requesting such a session should contact US Chess using the information above. US Chess will allow up to 3 hours for a visit (in person or online) by a bidder. The last day US Chess will provide these sessions is April 15, 2019.

## Notice and Disclaimer

US Chess retains the rights to:

- accept non-compliant or "late" responses;
- invite any or all bidders to meet with US Chess for fact-finding sessions after the RFP deadline;
- discontinue the RFP process and not award a contract;
- select a winning bid prior to the announced end date for submissions;
- change the RFP process as outlined in the RFP document, including any relevant timetables and how proposals may be assessed.

