Request for Proposal:

ALTA.org Website Redesign

July 2021

Project Overview

The American Land Title Association (ALTA) will hire a firm to help us redesign our main website, unite several external sites, and improve our functionality, analytics, and user experience. This firm will also help ALTA modernize several components on the backend to improve the staff experience and help develop standards and procedures for web content.

Company Overview

The American Land Title Association, founded in 1907, is the national trade association representing more than 6,400 title insurance companies, title and settlement agents, independent abstracters, title searchers, and real estate attorneys. With offices throughout the United States, ALTA members conduct title searches, examinations, closings, and issue title insurance that protects real property owners and mortgage lenders against losses from defects in titles. ALTA also has a member category for vendor/suppliers.

ALTA exists to help our members excel in a changing business and regulatory environment. To accomplish our mission, we advocate on behalf of our members' and the industry's interests, provide education and information to our members, offer networking opportunities, and create and promote professional industry standards.

Schedule and Due Dates

Submission deadline: Parties interested in responding should submit proposals by August 6, 2021, via email to Shawn Sullivan, Director of digital and print media at shawn@alta.org.

Deadline for questions: The deadline to submit questions related to this RFP is July 23, 2021. All questions regarding this RFP should be directed to Shawn Sullivan, Director of digital and print media at shawn@alta.org.

The following schedule provides key events and their associated completion dates and is provided primarily for planning purposes. ALTA may modify the project timeline at its discretion.

RFP Issued	July 6, 2021
Q&A Submissions	July 23, 2021
Q&A Answers	July 30, 2021
Proposals Due	August 6, 2021

ALTA may, without liability, cost, or penalty, may at any time prior to or after closing time:
- Alter any dates in this RFP
- Cancel this RFP
- Amend or supplement this RFP
- Issue a new RFP for the same or similar services

Objectives

The objective of this RFP is to seek and retain a qualified web design firm to help us reimagine, rebuild and deploy a new ALTA.org website that balances our navigation content, builds on the technological advances we have achieved over the past two years with a new AMS and marketing automation software, integrate several external websites into one framework for a cohesive look, and deploys a new CMS and other web software.

Scope of Work

A successful website redesign will incoporate these major items:
- **New front door:** We need a new homepage and structure that allows people to find their solution from our large amount of available information. They need to clearly select their desired path – for example, as a consumer vs. ALTA member vs. policymaker; while educating as to the statement of purpose for both ALTA and the title industry and highlighting the relevance of our current strategic priorities.
- **Website as a communication tool:** We want to build a website from the perspective of our members and take a deep dive into information that is on the website and decide if it is the right place for this information. Develop a minimum set of standards for new content on the website. Just because we have it doesn't mean it belongs on the website – and if it does belong, provide a structure for determining the best way to present it.
- **Curated user experience:** Our website has many products and services for our members, non-members, and our Policy Forms License Holders, to name a few. We would like to find a way to give users access to their most used and valued pages in a subtle way that does not interfere with the site structure or main navigation.

- **Better integration with our new platforms:** ALTA has undeveloped capabilities with our new AMS and Marketing Automation Software and we're looking to add a new CMS to this arsenal. With all these new toys and ways to communicate with our members comes chances for siloed data. We want to avoid this. All proposed CMS products _must_ integrate with the Impexium AMS.
- **21st century CMS:** ALTA's current CMS platform is a truly one of a kind, built from the ground up labor of love, but we feel it is time to consider a new CMS. A new CMS will address these major buckets:
    - Content Building: Ease of building additional menus, pages, and content, all within a responsive page layout/design
    - Data Analytics (_ALTA is willing to consider a paid for service_)
        - We would like to get more granular data on our members website usage and utilize this data to push relevant content to them.
        - Integration with our marketing automation tools
    - Improved security, user levels for posting/editing pages, role level access for accessing specific content
    - Secondary level capabilities: Integrated hosting of meetings, creation of boards/communities, scheduling of external events
    - New search engine (_this is a must-have_)
    - SEO, metadata and retargeting capabilities
- **Maps and graphics:** ALTA wants to tell the story of the title insurance industry, we do a great job of this, but title insurance is different in every state. We could use better tools to create state specific infographics and interactive maps that allow users to drilldown into county views to showcase how vital title insurance companies are to their local community.
    - Most of our current infographics are static and if we're being honest out-of-date, we need a database driven software package that allows us to update stats and have this information reflected on the website instantly.
- **Improved sponsor and advertising features:** The ugly truth is we will always have ads on our site, these ads need to be seamlessly incorporated in the design. We would also benefit greatly from a real-time list of what is available for purchase for our industry vendors, this is currently a PDF. Along with real-time opportunities we will need a simpler tracking and reporting system for our director of vendor relations.
- **Awesome 404 error page:** (fun but professional) Our members search court records, deeds and conduct in-person closings, we're sure there is some good fodder for a broken link page.

Budget Details

As a trade association, we are always careful to spend our dollars wisely and on behalf of the members who have invested in ALTA. Please provide details of the cost components for this project so that we can determine the best course of action and the correct budget.

Proposal Requirements

Responses to this RFP must include the following sections and information. Proposals that are non-responsive to the requirements of this RFP shall not be included for evaluation by ALTA.

1) **Proposal Requirements**
   - ALTA will develop content and text
   - ALTA will own all media and enter into contracts with all 3rd party software platforms
   - Proposals will include detailed timeline from kick-off through go-live and follow-up/support
   - Proposals will include detailed list of deliverables
   - Proposals will include breakdown of pricing for deliverables
   - Proposals will clearly define responsibilities assigned to ALTA and ALTA Staff
   - Proposals will disclose any conflicts of interest and/or pending lawsuits

2) **Company Background and Qualifications**
   - Description of the proposer's services and activities.
   - Company's history, how many years in business and expertise in insurance, trade association/non-profit and Real estate websites.
   - Describe three recent and relevant projects in detail that the agency is/was engaged in and specify the agency's role. Provide samples of work, and describe why you feel these are great examples for ALTA to consider
   - List the address from which the primary work on the contract would be performed and the size of agency by headcount.
   - List the number of full and part-time employees. Do not list any sub-contractors in this section.
   - Provide three references and describe why they can accurately provide an assessment of your dedication and capabilities.

3) **Personnel/Management**
   - Identify those individuals on the proposer's account team who will manage the contract work. Identify specific individuals who will be conducting the day-to-day activities. Identify all personnel assigned to this account by position title. Include a description of the duties of each position title.
   - Note who will be the contract manager and primary contact.

- Document overall experience on insurance and association accounts and include current resumes and/or biographies for personnel. Provide education, experience and expertise with pertinent information demonstrating qualifications for this RFP. Include length of time with agency and length of time in any previous related positions.
- Subcontractors: Identify all proposed subcontractors and document which portions of service will be performed by subcontractors and their ability to perform the work. Include current resumes and/or biographies.

4) **Scope of Work**

Proposer should prove the agency's capability; describing strategies to be used and quality controls. The scope of work should demonstrate knowledge and understanding of web development and the shifting dynamics of how members and consumers interact with websites.

- **Strategic planning and requirements discovery:** Provide a summary of how your team approaches getting to know a client, the approach to requirements discovery and documentation, and provide any details and past successes that you feel are unique to your process.
- **UI/UX Design:** Great requirements without a great user experience can't make our clients better informed and their day more efficient. Provide any details that allow you to translate the need into an interface that is intuitive, easy to use and extensible, while at the same time handling the diverse needs of multiple client populations that require a wide variety of information.
- **Research and analytics: "***In God We Trust, All Others Must Bring Data"* We're looking for data driven decisions, help us understand how you would use our data to build a great user experience.
- **Project timeline for October 2022 release:** Provide a basic roadmap with all major milestones, if you are using a project management software let us know how we will utilize this as a team and keep us on time with deliverables. We have also discussed internally rolling this major project out in a staggered deployment. For example, new homeclosing101.org goes live June 1, 2022, for National Homeownership Month.
- **Association Management Software Choices:** There are many CMS and Association specific solutions from which to choose to achieve objectives – and we will rely on your experience to better inform our decision moving forward. Tell us the types of solutions you have provided, and what decision points have led you to choose systems for your clients.
- **3rd party software analysis:** As listed above we are anticipating the potential need to obtain new software platforms. Give us some detail on how you research and recommend the best options for your clients.
- **Development, production and deployment:** *(potentially handled in partnership with our consulting web developer)*: We have a slightly different

setup from other associations, where our consulting web developer will be the point person for deploying the website. With this knowledge, can you give us an idea of what level of interaction you anticipate as we deploy the site.

- **Documentation:** Documentation of design, style components, processes for adding content post-launch, navigation growth/adjustment over time, etc.
- **Post-launch roles and responsibilities:** Site is up, everyone loves it. What do you see as your role post-launch? What benefits could your company provide post-launch?
  - ◊ Develop homepage explainer video to summarize changes, new features and where people can find things.

5) **Work Plan/Schedule:**
Please submit a preliminary work plan or schedule for the full, gone-live completion of the project by October of 2022. The work plan should include a schedule for completion of the following project tasks, and as we love open communication, your biggest concerns in achieving the timeline and any risks you would be working against:
- Strategic planning and requirements discovery
- UI/UX development
- Research and analytics
- Project timeline for October 2022 release:
- 3rd party software analysis
- Development, production and deployment
- Documentation
- Post-launch role and responsibilities