ESX inc.
esolution experts

1350 Nasa Parkway, Suite 202, Houston, TX 77058

Contact: Patty Turner
281-822-6506, pturner@esxinc.com

Proposal for
Association Management System (AMS)
& Website Management System (WMS)

Prepared for

Colorado Counseling Association

Sean Boyd | President
http://www.coloradocounselingassociation.org
7450 W 52nd Ave., Suite M244
Arvada, Colorado 80002
Email: sboyd@coloradocounselingassociation.org
Phone: 303-562-4957

Friday, May 22, 2015

Table of Contents

Introduction

About ESX

ESX, Inc. is pleased to have an opportunity to present this proposal to Colorado Counseling Association for xCatalyst software and services. We greatly appreciate your interest in our company and look forward to an opportunity to work with your organization.

ESX is a privately held software company located in Houston, TX. ESX has been developing innovative software solutions since 1999. During that time ESX has received a host of honors, having been named three times as a Fast Tech 50 company, and as one of the city's Top 25 software companies by the Houston Business Journal.

"It's more than just software"

The success of this project relies on more than technology. ESX has the reputation of making sure a project is successful at all levels and our customers recognize our contribution.

What our clients say about us:

"We reviewed many products and while all had similar features – the xCatalyst staff was the most prepared and wanted to see us create a better product – not just business as usual."

Jean M. Maddalon, Chief Financial Officer - American Business Media

"With xCatalyst we manage renewals for more than 25,000 members with two data entry people - half as many as it would take the old, manual way."

Katie Jones, Membership Manager - National Association of Mortgage Brokers

"ESX just gets it."

Melinda L. Eggenberger, Vice President - Lex Mundi

"ESX, Inc. is always there for me 100% of the time. I know they can think out of the box – they are good at that!"

Suzanne Gschwind, Dir. Web and Print Communications – Rice University Public Affairs

Section I - Overview

It is our intention to show how ESX, Inc. can be your technology partner in all aspects of website management, web communications, and database operations.

xCatalyst Modules

Website Management System (WMS) - Provides centralized administration and control of branding, global content, and assigning editing privileges; while also granting the ability to distribute content management to a broad spectrum of contributors. The WMS allows staff (and approved personnel) to easily develop and maintain respective content for the website without additional technical skills or additional software applications.

Association Management System (AMS) - Seamlessly integrates the database for people/company profiles, membership, email communication and other modules with your organization's website. The AMS replaces disparate information silos and inefficient workflows with a centralized database and an easy to use software platform.

WMS and AMS address requirements for both website management and association database administration – and most importantly is totally integrated.

Event Module – Provides tools necessary to create, manage, and market events. Seamless integration with the Membership Management Module and Website Content Management System streamlines workflows and eliminates bottlenecks. The events module allows for member and non-member registrations, secure online credit card processing including refunds and fee adjustments, automated email notifications/receipts, discount codes, multiple event fees (e.g. students, members, non-members) with "a la cart" functionality, generate event rosters/list/names badge, export event data and scan check-in.

Committee/Community Module – Enables site membership as well as the ability to create sub-communities or micro sites for affinity groups. It promotes relationship building, interactivity, and provides for the ability to create and maintain site member generated content. The community module also allows for creation of access-controlled communities for staff, members, committees, and Board members to deliver group-specific content and facilitate group interaction.

Chapter Module – Allows enrollment and renewal of individuals to specific chapters. Users can be assigned rolls within chapters for specified time period.

Subscription Module – Allows add on sales of subscription items such as fiscal and/or group subscriptions. Both individual and company subscriptions can be included in enrollment and renewal membership processes or simply a standalone subscription.

Scholarship Module – Allows scholarship application management from submission including document downloads and uploads to application reviews to award matching and acceptance.

Job Board Module – Allows companies to post and manage online job listings, add job listing to a classifieds, and search/view online resume's, as well as match job specifications to qualified online resumes. It also gives job seekers the ability to post a resume', and view/search/express interest in posted jobs.

Call for Papers Module – Allows for administrators to requests Papers/Abstracts to be presented at a Conference/Event. Allows website users to submit papers for review and scoring. Allows reviewers to login and score papers. Allows administrators to set the paper status manually as rejected/accepted. Reporting is available to show paper scores per event.

xCatalyst Services

- SEO Services

- Corporate Rebranding includes the following deliverables:
  - ➢ Logo creation per customer specifications, delivered as vector file.
  - ➢ Suggested color pallet, delivered as PDF file (low resolution) with Pantone/CMYK/RGB/HEX color specifications.
  - ➢ Brand style guide (15 pages) delivered as PDF file with recommendations for font typeface and style usage.
- Google Management Services
- 301 Redirect Implementation (more than 5 requires a dedicated install)

List of ESX References

Kathleen Pope-Sance | Marketing Director
Lex Mundi
2100 West Loop South, Suite 1000
Houston, Texas 77027
713-328-4521
kpopesance@lexmundi.com

Diane Austin | Executive Director
Louisiana Counseling Association
353 Leo Avenue
Shreveport, LA 71105
888-522-6362
lca_austin@bellsouth.net

Patrick Finnegan | Director of Administration
Texas Construction Association
1011 San Jacinto Boulevard, Suite 330
Austin, TX 78701
512-473-3773
pfinnegan@texcon.org

Additional references available upon request

List of Relevant Past Projects

Texas Counseling Association (www.txca.org) – Features: website, membership, events, call for papers

Louisiana Counseling Association (www.lacounseling.org) – Features: website, membership, events

Christian Camp & Conference Association (www.ccca.org) – Features: website, membership, job board

Section II – Implementation and Pricing

Proposed Turnkey Implementation

Standard Website Setup

- Standard template implementation (1 website)
- Setup of applicable WMS features (i.e. Calendar, News Stories, Communities)
- WMS Training

Association Database Setup

- Platform configuration
- People and company profile setup
- Standard online directory setup
- Membership configuration
- Committee/Community configuration
- Event configuration
- Job board configuration
- Subscription configuration for division functionality
- Data import (people, company, membership)
- Emailer Tool Configuration
- AMS Training

Managed Hosting Services, software maintenance and administrator support

- Full hosting services including daily backup of website and database
- Software enhancements and upgrades at no additional cost
- Phone and email support for staff

ESX Hosted Pricing*

Proposed Annual Hosting, Maintenance, Support – On-Going Cost

Item	Cost
Website Management System	$250
Membership Management	$150
Event Management	$100
Subscription Management	$50
Committee/Community Management *(Value: $50)*	$0
Job Board Management	$50
Total Monthly Cost	**$600**
Annual Total of On-Going Cost	**$7200**

Proposed Implementation – One Time Cost

Item	Cost

ESX Basic Template Implementation
Other Website Template Options:
    Existing Template Migration - $3750
    Complete Creative Design (1 composition, 2 iterations) - $9375
	$1600

Database Import *(people, company, membership)*	$2400
Standard Online Directory Setup Other Directory Options: Custom Online Directory Setup - $3500	$800
Job Board Setup	$1250
Total One-Time Cost	**$6050**

Other Cost for Consideration

Item	On-Going Cost (Monthly)	One-Time Cost
Chapter Management	$50	
Call for Papers Management	$50	$1250
Content Import (up to 50 pages)		$1200

ESX SSL Certificate Fees, as needed **

Item	Cost
"SSL Web Server" Certificate Enrollments/Renewals	
1 year Enrollment / Renewal	$199 / $189
2 year Enrollment / Renewal	$345 / $335
3 year Enrollment / Renewal	$495 / $475
"SSL 123" Certificate Enrollments/Renewals	
1 year Enrollment / Renewal	$120 / $120
2 year Enrollment / Renewal	$200 / $200
3 year Enrollment / Renewal	$300 / $300

Note: Pricing will be valid thru 7/21/15.
Initial 16-hours of webinar training included in proposed pricing. On-site training is available at an additional cost for travel expenses not included in this proposal.

*Pricing is based on a minimum two year agreement.   First year on-going monthly cost will be invoiced when the website and database is delivered for review. Other payment terms are available at additional cost. Applicable sales taxes are not included.

** Pricing provided for organizations that do not currently have certificates. SSL Certificates are used to verify the security of a website. "SSL Web Server" Certificate validates the domain and business address.

Confidential & Proprietary Information

Customer shall maintain in confidence, and not disclose or distribute to any third person any Information or documents of **ESX Inc.**

ESX Inc., shall maintain in confidence, and not disclose or distribute to any third person any of Confidential Information of Customer, until Customer publicly discloses such information without confidentiality restrictions or the information otherwise becomes publicly available through no fault of **ESX Inc.,**. Furthermore, **ESX Inc.,** agrees not to retain or use any Confidential Information of Customer beyond termination of this Agreement and will upon termination promptly return any and all copies of such information to Customer and sign an affidavit that all such data has been returned.

Notwithstanding the foregoing, trade secrets of either party shall be kept confidential until the disclosing party publicly discloses such information without confidentiality restrictions or the information otherwise becomes publicly available through no fault of the receiving party, provided the trade secrets are specifically mentioned in the last paragraph of this section or are marked as being trade secrets upon disclosure to the receiving party.

"Confidential Information" shall mean all information of a confidential nature disclosed by either party to the other party pursuant to this Agreement, including, without limitation, **ESX Inc.'s** Software and Products as **ESX Inc.'s** Confidential Information, and confidential or personal information of the Customer and its members, customers or other parties included in the data provided to **ESX Inc.,** ("Customer's Protected Data") as Customer's Confidential Information. The parties acknowledge that the Source Code of **ESX Inc.'s** Software is a trade secret of **ESX Inc.,**, and Customer's Protected Data is proprietary and confidential to Customer. Confidential Information does not include any information that: (i) entered the public domain through no fault of the receiving party; (ii) is rightfully received by the receiving party from a third party without similar non-disclosure obligations; (iii) is already known to the receiving party prior to disclosure by the disclosing party; (iv) is independently developed by the receiving party without reference to the Confidential Information of the disclosing party, or (v) is required to be disclosed by law, provided that the party intending to make such required disclosure shall promptly notify the other party of such intended disclosure in order to allow such party an opportunity to seek a protective order or other remedy, if possible. The obligations set forth above in this Section shall not affect **ESX Inc.'s** ownership of any inventions created hereunder and all intellectual property rights therein, or **ESX Inc.'s** full exercise of those inventions and intellectual property rights, so long as **ESX Inc.,** does not disclose Customer's Confidential Information. "Source Code" means the human-readable version of a software program that can be compiled into executable code.