

Introduction to Request for Proposals

Critical Ecosystem Partnership Fund Website Redesign and Redevelopment

The Critical Ecosystem Partnership Fund seeks to contract with a website development firm to redesign and redevelop the cepf.net website. This is a request for proposals to complete the work.

Request release date: September 30, 2016

Proposals due date: October 24, 2016

Contractor selection date: November 20, 2016

Work start date: November 28, 2016

Completion date: June 30, 2017

Budget: \$110,000

The contractor will design and build a mobile-friendly website with a flexible module-based content management system for CEPF. The goal of the new website is to enhance learning and enable project replication by effectively disseminating CEPF's knowledge products, including models, tools and best practices through the most innovative digital mechanisms available.

Key deliverables

- Design a mobile-first website based on modules
- Build/Customize and implement a content management system (see appendix 8)
- Build and design a project/grants database that pulls information from integrated third-party FoundationConnect grants management system (see appendix 7)
- Build and design a digital asset library that contains all media, i.e. documents, video, audio, images, etc. This may be the same as the project/grants database (see appendix 7)
- Develop tagging system that allows for sitewide connections between modules, content, and assets that share tags (see appendix 7)

The website project is expected to begin in November 2016 and should be complete within the following six months. The final work schedule and timing will be determined jointly between CEPF and the successful applicant.

This request for proposals and accompanying appendices outline the objectives, audience, constraints, success factors, scope of work (terms of reference), deliverables, and proposal submission process for the website project.

ADDITIONAL INFORMATION

Requirements for the proposal to be considered

- Delivered on time and received electronically in any format to jshaw@cepf.net and mhozempa@cepf.net
- Includes evidence of experience with similar assignments, proposed timeline, briefs on available key personnel, methodology to implement project, and budget providing line item details showing unit cost, quantity, and total amounts per budget category including personnel
- Portfolio of comparable past projects and their results
- Written in English and signed by authorized representative of the bidder

Clarification questions

Until October 16, questions may be asked in writing to Maren Hozempa at mhozempa@cepf.net and Julie Shaw jshaw@cepf.net

Collected answers will be provided to all bidders by October 19, and bidders may revise proposals up until October 24.

Submission process

Interested applicants should provide information demonstrating that they have the required qualifications and relevant experience to perform the scope of work, including a portfolio of comparable past projects and their results.

Proposals must be delivered electronically by 5 p.m. Eastern, Monday, October 24, 2016, to both e-mail addresses: mhozempa@cepf.net and jshaw@cepf.net

Type of contract

The contract will be fixed price with payments made in USD on completion of deliverables.

Evaluation process

Review of the proposals will be conducted by a selection panel, including three CEPF Secretariat members and two Conservation International website experts. The three top-scoring proposals will be short-listed and asked to make in-person/teleconference presentations the week of November 7, 2016. The winning proposal will be selected by November 20. The contract will be signed the week of November 20, with work to commence by November 28.

Once an award is made, unsuccessful bidders will be notified in writing that their proposal was not selected.

The following table lists the evaluation criteria and the maximum points allotted to each in scoring of candidates.

Evaluation Criteria	
Evidence of completing assignments of similar size, scope, and complexity	20
Methodology	20
Technical and business reputation, and recommendations from external sources	20
Availability of appropriately skilled team leader and other personnel	15
Budget	15
Proposed timeline	10
Total points	100

Point of contact

Further information can be obtained during office hours from

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and

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Full Request for Proposals

Critical Ecosystem Partnership Fund Website Redesign and Redevelopment

The Critical Ecosystem Partnership Fund seeks to contract with a website development firm to redesign and redevelop the cepf.net website. This is a request for proposals to complete the work.

The contractor will design and build a mobile-friendly website with a flexible module-based content management system for CEPF. The goal of the new website is to enhance learning and enable project replication by effectively disseminating CEPF's knowledge products, including models, tools and best practices through the most innovative digital mechanisms available.

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This request for proposals and accompanying appendices outline the objectives, audience, constraints, success factors, scope of work (terms of reference), deliverables, and proposal submission process for the website project.

BACKGROUND

www.cepf.net (also cepf.ngo) is the website for CEPF. Its primary purpose is to serve as an interactive resource for CEPF's knowledge products (project models, tools and best

practices) for grantees (conservation practitioners, within both government and civil society) and donor agencies.

The website has about 350 daily visitors (10,500 monthly visitors), 67% of them first-time visitors. About half of the visitors enter the site through an organic search and the other half by direct or referral links. The web audience is about 50% U.S. and 50% international.

Most visitors are not the targeted audiences. Two years ago, the website inherited material on the world's biodiversity hotspots from Conservation International's conservation.org. This draws a lot of traffic from academia, the vast majority of who are unlikely to work/partner with CEPF, although resulting mentions of CEPF in published articles and other resulting awareness-raising has some value.

www.cepf.net/fr and www.cepf.net/jp are the French and Japanese language websites. They are **not** exact mirrors of the English site. Their current purpose is to provide targeted information to their specific language-speaking audience. In the future, ideally, they would become complete translated mirrors of the English site, and individual pages would link to their mirrors in the other languages. The French site has about 200 monthly visitors, 95% from French-speaking countries. And the Japanese site has about 40 monthly visitors, 75% from Japan.

CEPF's third operational phase includes a comprehensive strategy to address mounting pressures on the world's critical ecosystems and the conservation field by significantly scaling up its capacity, reach and impact. There is particular emphasis on empowering civil society (nongovernmental organizations) in the biodiversity hotspots to take the lead on local and regional conservation efforts in the future. To accomplish this, CEPF will employ the best digital tools to widely disseminate knowledge products to partners and conservation practitioners so they can learn about CEPF's impact and challenges and replicate its successes globally.

A user-friendly, modern and comprehensive website, as part of a broader communications and digital content strategy, is needed to be truly effective in this endeavor. An innovative and flexible website provides the most effective platform for CEPF to disseminate its knowledge products, facilitate learning, promote its unique approach and value proposition, communicate impacts and results, and engage new grantee and donor partners, now and in the future.

Website objectives

- Develop a mobile-friendly website that is flexible enough to update as technology advances

- Ensure that the navigation makes sense to our visitors and leads them to what they want to find in as few clicks as possible
- Update and integrate the hotspots information so that it relates to the work that CEPF does
- Create a visually compelling, understandable way to express the bulk of our core content
- Provide easy access to all of CEPF's knowledge products for current and potential grantees and donors through user-friendly experiences
 - **Develop project database and digital asset library (combined or separate)**
 - Develop infographics to share data and results
- Serve as a compelling communications channel to highlight CEPF's stories
- Immediately answer what CEPF does, and how the visitor can partner with CEPF either as a grantee or donor
- Position CEPF as an effective agent of change, using partnerships, stakeholder-informed strategy and field work to get demonstrable results
 - Develop a portal for grantees to access information and exchange ideas

Triggers for redesign project

- After 15 years of operations, CEPF has begun a third phase of its program that will significantly scale up its reach
- Expanded website goals:
 - Provide easy-to-use platform that invites grantees to engage with knowledge products and, possibly, each other
- New storytelling strategy:
 - Provide compelling narratives to improve access to learning resources and knowledge products, showcasing CEPF's work at many levels of scale and partnership:
 - Communicate CEPF's work, issues, solutions and impact
 - Designed to increase learning and encourage replication through stories
- Current website is hosted on the Microsoft SharePoint 2013 CMS, which MS will stop supporting in April 2018
- New technology is available that enhances user experience with responsive and device-agnostic design, social media integration, and interactivity

Appendices

1. Summary of 2015 and 2016 analytics
2. Stakeholder Report
3. Audiences
4. User Stories

5. Individual Pages' Information Architecture
6. Foreign Language Website Strategies
7. Website Function Requirements
8. Website CMS requirements
9. Proposed Overall IA and Sitemap

PROJECT BRIEF

This is a comprehensive redesign, in which we will rethink the structure and user experience of the entire site. An opportunity exists to re-engineer the site to better reflect the Phase III mission of CEPF and incorporate the latest web technology to ensure the best user experience, enabling users to quickly and efficiently access what they need.

Through the website, CEPF will disseminate at least six (6) newly developed innovative knowledge products documenting models, tools and best practices developed under the project, including at least one (1) related to gender mainstreaming and at least one (1) related to Indigenous People and conservation.

Problem statement

The website needs to serve as a mechanism that showcases our exceptional knowledge products (models, tools and best practices). Information should be easily digestible and easy to access with a structure and information architecture that makes sense for the user. The website needs to be concise, to-the-point and visually engaging in order to highlight our impact and facilitate learning.

1. Homepage and global navigation elements

Current problems: The homepage doesn't make a strong visual statement, and we want it to be distinctive. Currently it is not effective in these ways:

- It does not give clear signals about what visitors are supposed to do once on the home page. It needs to provide clear entry points to engage.
- It does not answer the following questions plainly: What does CEPF do? What is CEPF's impact?

Redesign objectives:

- Ensure that the navigation makes sense to our visitors and leads them to what they want to find in as few clicks as possible.
- Guide the user experience on the homepage toward a clear engagement path by emphasizing the calls-to-action:
 - Access knowledge products

- Read stories of CEPF's successes and lessons learned
- Partner with CEPF as a grantee by applying to an open call for proposals
- Subscribe to newsletter
- Share on social media
- Partner with CEPF as a donor

2. Site organization and highly trafficked pages: Hotspots

Current problem: The site recently inherited outdated, but popular, web content on the world's biodiversity hotspots from conservation.org. CEPF's investments target hotspots, but the hotspots content is not well integrated with content about CEPF's work. So most new visitors enter the CEPF website through the hotspots pages, but do not learn about CEPF.

Redesign objective: We need to update and integrate the hotspots information so that it relates to the work that CEPF does. Visitors to those pages should be inspired to support CEPF's conservation strategies for the hotspots and replicate/expand on CEPF grantees' project successes. We are reorganizing, consolidating and combining the content of "Hotspots" and "Where We Work" sections, developing a new structure that is logical and user-friendly. We will integrate and highlight the importance of key biodiversity areas and showcase biodiversity maps.

3. Dissemination of best practice approaches and tools

Current problem: CEPF grantees generate a number of best practices, tools and lessons learned that would be valuable to other conservation practitioners, but these are hidden within the current website and not easily accessible to visitors.

Redesign objective: Create an accessible portal for accessing core content on best practices, tools and lessons learned generated by CEPF grantees. This will be searchable by geographic, topic and key word, and occupy a prominent position within the website architecture. Ideally, selected content will be tagged and displayed in summary form in different parts of the website, to drive traffic to the main portal page.

4. Secondary-Level Templates

Current problem: The secondary-level templates are outdated both in terms of user experience (lots of JS tabs) and the content itself.

Redesign objective: Create a visually compelling, understandable way to express the bulk of our core content. Ideally all this will be done using modular layouts on a single layout. Tagging of modules will allow for cross-pollination between similar content types.

5. Better integration with smartphone and tablet technology

Current problem: The current site was created before the smartphone and tablet technology revolution, and is therefore incompatible with these devices.

Redesign objective: Employ responsive design to ensure an optimal user experience on all platforms.

6. Interactivity

Current problems:

- CEPF has not previously identified its projects by topic or type of work, so grantees are unable to locate projects similar to theirs and read about lessons learned.
- Data and impact results are not regularly displayed in a compelling way.
- There is no way for grantees to communicate with each other through the website.
- The video and photo galleries use outdated technology, are not easy to use, and do not showcase material well.

Redesign objectives:

- Categorize projects by topic and type of work, and **create an interactive and user-friendly library/index.**
- Centralize monitoring information, make it easy to update regularly, and create interactive graphics.
- Create comment sections, chat rooms and/or interactive blog.
- Use HTML5, CSS3 and JavaScript to present CEPF's visual assets.
- CEPF's new grants management database, FoundationConnect, may alleviate some of the current problems.

Audiences (Read more in Appendix 3)

1. Grantees

Who:

Grant recipients and potential grantees range from small farming cooperatives and community associations to private sector partners and international organizations.

What they want from CEPF digital products:

- Easy and clear access to knowledge products, including but not limited to: models, tools, best practices, lessons learned, success stories, data, and documents
- Digestible knowledge products
- Guidance on how to replicate successes
- Connection with each other

- Easy access to knowledge products relevant to their location, topic, specialty area, or type of work
- Clear instructions/tools for responding to calls for proposals/applying for grants
- Clear indication of where CEPF is active and where CEPF has open calls for proposals
- Tools to help them manage and implement grants

What CEPF wants from them:

Applications for grants

Sharing of lessons learned/results

2. Donors

Who:

CEPF unites global leaders who are committed to enabling nongovernmental and private sector organizations to help protect vital ecosystems.

- Governments and multilaterals: EU, France, Japan, the World Bank, the Global Environment Facility. Potentially: Germany.
- Civil Society and Foundations: CI, MacArthur Foundation.

What they want from CEPF digital products:

- An online vehicle that allows grantees to easily and quickly access knowledge products (showing Secretariat support to grantees)
- Models for mainstreaming biodiversity conservation into public policy and private sector business practices
- Compelling storytelling with strong and bold visuals
- Data on results, impact and successes of CEPF

What CEPF wants from them:

Reinvestment and new investments; recruiting of new donors

3. General public

Who:

The visitors to the Hotspots pages are our largest constituency. CEPF doesn't target them, but should provide comprehensive and quick links between the Hotspots information and the work that CEPF does.

What they want from CEPF digital products:

To learn more about biodiversity conservation in an engaging and compelling way.

What CEPF wants from them:

To talk and write about CEPF, helping to raise awareness (academic papers, social media, etc.)

SCOPE OF WORK (Terms of Reference)

The contractor will work with CEPF to design a new look and develop a new CMS for cepf.net. The contractor will provide the following services and deliverables:

Review CEPF Discovery (Appendices 1-9)

- Review CEPF-produced reports
 - Website goals
 - Google Analytics data, social media analytics, and email analytics
 - User research and user flows
 - Stakeholder interviews report
 - User personas and user flows
 - Information Architecture (IA)
 - Current content inventory and IA
 - Proposed content inventory and IA
 - Current structure of selected types of content
 - Proposed structure of selected types of content

Project Management

- Review proposed contract and scope of work outlining the agreed-upon project plan, strategy and production schedule.
- Establish and maintain overall project plan, including the timeline, budget, milestones and deliverables.
- Ensure that detailed specifications are developed for all project elements.
- Communicate regularly with CEPF contacts, in person, on the phone, in writing and during regularly scheduled check-in calls and meetings.
- Take detailed notes during every check-in meeting and call.
- Identify and detail change orders, and discuss the impact on the budget and timeline prior to any work being done.
- Ensure every team member has a clear set of goals, specs and priorities
- Ensure that test plans are developed and executed effectively
- Ensure the final solution complies with the project goals, specifications and client expectations.
- Launch the new web solution on time and on budget

User Interface / User Experience Design:

- Create desktop and mobile wireframes based on a proposed modular document library. The number of wireframes and feedback rounds will be informed by the review of CEPF's discovery reports, project time and cost.
 - Includes users flow
 - Includes homepage, secondary pages, document library pages, index pages

Visual Design

- Design mood boards for three distinct visual directions and present them for review before developing designs for specific pages/modules
- Create 2-3 homepage designs and present for review
- Create designs for mobile and desktop sites based on the wireframes and modular document library
- Develop style guide that includes design elements such as typography and colors

Design Build-Out

- Implement and build designs into responsive, standards-compliant and accessible HTML5, CSS3 and JavaScript
- Develop structure of modules and page layouts
- Develop HTML prototypes implementing UX and visual design
 - Will include review phases
- Develop layered design files

CMS Build-Out

- Configure the baseline system
- Build the necessary document types and display/publishing options
- Integrate the design and UX into the CMS
- Link up CMS admin pages under a password-protected admin directory
- Determine logic and configuration for all interactive pages
- Use built-in configuration tools and add-on/custom modules
 - Develop a modules kit/library
- Creation of the directory structure
- Develop master style sheet

Content Migration

- Migrate existing and new content to the new site structure
- Migrate existing and new content into the CMS
- Strip headers and footers from existing content and clean up HTML coding
- Apply the new design templates to all static and dynamic content

Quality Assurance

- Complete extensive quality assurance and testing across an array of browsers and devices based on ce pf.net analytics and industry norms
- Run a link check report to ensure all links are valid
- Ensure implemented design matches the comps
- Implement test plans and use cases to ensure the final applications match the specifications
 - Establish test cases to test the integration between the website and applications, error conditions, user flows and SEO
 - Round 1: Test development site, provide list of changes
 - Revise site based on changes
 - Round 2: Test development site, provide list of changes
 - Final revisions to site based on final changes

Launch new website

- Migrate to Hosted Server

Hosting

- Ongoing Web hosting services
 - Designed for continuous operation 24 hours a day, seven days a week with express maintenance windows clearly defined. Host must have adequate redundant equipment to minimize down time.

Analytics

- Establish baseline with current website
- Create the tracking configuration for new site, implementing custom GA functionality (leveraging Google Tag Manager) to include events, custom variables and goals.
- Implement tools to track success metrics identified by CEPF discovery
- Ensure that tracking scripts are embedded into main site templates and headers

- Create profiles to track different filtered user segments based on criteria such as operating system, location, returning vs. new visitors, etc.
- Develop site goals based on pageviews, time on site, and specific destination pages
- Develop custom segment reports that split a profile filter into specific data tracking options
- Create individualized metric reports comparing vital, specific statistics

Hand-off

- Content Migration
- Fixes to Quality Assurance check
- Training in-house staff to use the CMS

Deliverables

1. Initial mobile and desktop design and **UX** wireframes
 - a. Home page, including header and footer
 - b. Top level pages
 - i. About
 - ii. Where we work/Hotspots
 - iii. Calls for Proposals/Grants
 - iv. Stories
 - v. CEPF and Climate Change
 - vi. **Resources/Project Database/Lessons Learned/Grantee Portal/Asset Library**
 - vii. Grantee Partners List
 - c. Index page
 - d. **Project database**
 - e. **Document Library**
 - f. Text module
 - g. Infographic widget
 - h. Social media widget
 - i. Video widget
 - j. Photo gallery widget
 - k. Audio widget
2. Revised wireframes
 - a. First full set, one week after CEPF review
 - b. Second full set, one week after CEPF review
3. Initial mood boards with three distinct visual directions
4. Revised mood board, one week after CEPF review

5. Initial mobile and desktop design compositions
 - a. Home page, including header and footer
 - b. Top level page example
 - c. Index page
 - d. **Project Database**
 - e. **Document Library**
 - f. Widgets
6. For one selected design direction, revised compositions
 - a. First full set, one week after CEPF review
 - b. Second full set, one week after CEPF review
 - c. Third full set, one week after CEPF review
7. Initial interior page design compositions
 - a. Secondary page example
8. Revised interior page design compositions
 - a. First full set, one week after CEPF review
 - b. Second full set, one week after CEPF review
9. Layered mobile and desktop design files from compositions
10. Users flow
11. Style Guide /Comprehensive UI library
 - a. Colors and CSS styles
 - i. Links (normal, active, hover, visited)
 - ii. Heads
 - iii. Subheads
 - iv. Paragraphs
 - v. Call out text
 - vi. Spotlight text
 - vii. **Project Database**
 - viii. **Document Library**
 - ix. Tables
 - x. Infographic elements
 - xi. Skins for multimedia widgets
 - xii. Animations
 - b. Typography
 - i. Heads
 - ii. Subheads
 - iii. Paragraphs
 - iv. Call out text
 - v. Spotlight text
12. **Review Project Database/Digital Asset Library proposed IA and UX**
 - a. Library data

- i. Lessons Learned and corresponding publications
 - ii. Grantee and subgrantee partners list
 - iii. Contact info for RITs and grantees
 - iv. Project Database to include:
 - v. Integration with Foundation Connect
 - Pull documents: Project Final Competition Reports, Safeguards, Technical Reports, and corresponding appendices
 - Pull new grants with web descriptions
 - b. Sort and search by
 - i. Title
 - ii. Hotspot
 - iii. Region
 - iv. KBA
 - v. Corridor
 - vi. Country
 - vii. Grantee
 - viii. Pre-defined project category
 - ix. Grant period
 - x. Active/inactive
 - xi. Grant amount
 - xii. Keyword
 - xiii. Alphabetically
 - xiv. Chronologically
 - c. View type of document, examples:
 - i. Templates
 - ii. Models
 - iii. Tools
 - iv. Best practices
 - v. Lessons learned
 - vi. Final reports
 - vii. Safegaurds
 - viii. Technical
 - ix. Other project-specific assets (video, photos, links, documents)
13. **Design and build out database with indexing and search for joint or separate databases/libraries following proposed guidance in deliverable 12 and appendix 7**
14. **Roadmap to integrate Foundation Connect**
15. Build out and test mobile and desktop compositions integrating UX into HTML, CSS and JavaScript
- a. Header
 - b. Navigation

- c. Footer
- d. Home page
- e. Top level page
- f. **Database/library**
- g. Widgets
16. Build out and test CMS, integrating design
 - a. Configured baseline system
 - b. Document types and display/publishing options
 - c. CMS admin pages linked under a password protected admin directory
 - d. Logic and configuration for all interactive pages
 - e. Add-on/custom modules
 - f. Directory structure
 - g. Master style sheet
17. Build out and test Modules Kit
 - a. Module style sheet
18. Google Analytics custom configuration and tracking document
19. Migrate content
 - a. Existing and new content migrated to the new site structure and CMS
 - b. Edited existing content to strip headers and footers and clean up HTML coding
20. Quality Assurance
 - a. Link check report to validate all links
 - b. Implemented design matches the comps
 - c. Tests and use cases showing that the final applications match the specifications
21. Hand-off
 - a. Migrate website to hosted server
 - b. Make fixes found in Quality Assurance check
 - c. Train in-house staff to use the CMS

Success Metrics

- Targeted pages have an increase in views by 15%
 - Results
 - Calls for Proposals
 - Project Database
 - Learning hub/grantee portal (lessons learned, good practices and other material currently on Learning Page)
 - Our stories (including features, revamped blog)
 - How to apply
 - Biodiversity hotspots
- User flow increases viewership from Hotspots to CEPF's work by 15%

- Bounce rate decreased by 15%
- SEO: improve natural search ranking for key terms (TBD)

POTENTIAL TIMELINE

Reviews will be done by CEPF communications, finance, executive director, and Secretariat; and CI IT and web teams; and GEF representative

CEPF's schedule

Dates	Actions
September 30, 2016	Release RFP
October 24	Receive Proposals
October 24–31	Review Proposals to select top 3
October 31–November 4	Phone interviews with top 3
November 7–11	In-person/teleconference interviews with top 3
November 11–20	Review interviews
November 21	Select vendor and sign contract
November 21 or 28	Vendor starts work

Example Schedule for Vendor

Dates	Work Phase
November 28–December 5	Review discovery reports and establish work plan
December 5–March 3, 2017	Visual Design
December 12–February 3	User Experience Design
March 6–May 5	Design Build-Out
March 13–May 26	CMS Build-Out
May 5–June 2	Integration Support
May 5–June 30	Quality Assurance
June 30	Launch

PROPOSAL SUBMISSION AND EVALUATION

Submission Process

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Please make the Subject line of your e-mail, "Proposal: Website Redesign from [Company Name]"

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Review, Evaluation and Approval Process

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Contact Information

Further information can be obtained during office hours from
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