Request for Proposal:

Digital Experience Redesign
October 10, 2024

Respond to:

Chris Leo Palermino, Web Marketing Manager
Episcopal Relief & Development
communications@episcopalrelief.org

Response deadline:

October 31, 5 p.m. ET

RFP issued by:

Episcopal Relief & Development
815 Second Avenue
New York, NY 10017
+1 (855) 312-4325

Table of Contents

Part 1: Website Redesign of episcopalrelief.org

This website redesign project includes developing new information architecture, a user experience, design, content strategy, technical strategy, and platform build based on our user research and strategy developed this last year. Please specify what CMS the build will be on. WordPress or Drupal are preferred.

Part 2: Donation Platform Selection & Implementation

Creating a modern digital experience is contingent upon our implementing a new fundraising platform. Our current experience fragments both the user journey and our databases. We seek assistance identifying a fundraising platform that is appropriate to our size and needs; setting up the donation experience, and preparing us to manage it in-house post-launch.

Organization Introduction

For over 80 years, Episcopal Relief & Development has worked with an extensive network of faith-based and secular partners to advance lasting change in communities affected by injustice, poverty, disaster and climate change.

Inspired by our faith and grounded in expertise, we reach over three million people annually, achieving impact through an approach that is purpose-driven, compassionate and respectful of the dignity of all human beings. Through collaboration and shared learning with local faith leaders and organizations with deep community ties, we strengthen each partner's capacity to operate within highly challenging contexts and provide effective responses and care amidst disaster, crisis and growing instability.

Project Timeline

Activity	Date
RFP posted	October 10, 2024
RFP question submission	October 10-15, 2024
RFP answers shared	October 17, 2024
Proposals due	October 31, 2024
Notification of finalists	November 11, 2024
Finalist interviews	November 12-15, 2024
Agency / agencies notified	November 20, 2024
Project start	December 2024
Launch of website with donation platform	Spring 2026

815 Second Avenue
New York, NY 10017

O: 855.312.4325
F: 212.687.5302

info@episcopalrelief.org
www.episcopalrelief.org

Background

Through our research, we defined project goals, tactics, and key audiences for episcopalrelief.org. Goals and audiences are summarized below. Agencies may request access to our Strategy Brief for additional information by completing this form.

Project Goals

This project follows a recent brand refresh, development of an organizational 10-year strategic plan, development of a strategy for our digital experience, and a phase of stakeholder and audience research. Overall, this project should make episcopalrelief.org modern, usable, engaging, and easily managed by our team.

Part 1: Website Redesign

Redesigning episcopalrelief.org should:
1. Make donating quick, easy, and frictionless.
2. Improve and streamline content to align with strategic priorities.
3. Improve the findability and discoverability of content.
4. Redesign the site to match the brand refresh.
5. Move to a more sophisticated, self-service, and editor-friendly CMS.

Part 2: Donation Platform

There are 3 ways for an individual donor to give online to Episcopal Relief & Development: donation pages on our main website built with WooCommerce; custom-built pages for disaster response on our microsite, support.episcopalrelief.org; and our Gifts for Life Catalog. Part 2 does not include reimagining, integrating with, or supporting the Catalog. Goals for Part 2 include:
1. Improve the usability of our donor database through better data lookup functionality, systems integration, and other user-friendly features and functionality.
2. Make it easy for our team to quickly create new campaign or event-specific pages for donating in response to disaster relief.
3. User-facing donation forms can be themed to match our brand, are accessible, and easy for users to complete.

Website Audiences

There are four major direct audiences and three peripheral audiences for this project, whose needs and preferences should be central to all redesign decisions.

Direct Audiences
1. Relational or identity-based individual donors: those who donate because of values alignment and/or a personal connection with our organization
2. Situational individual donors: those who donate in response to specific humanitarian crises or natural disasters
3. Institutional funding partners: private foundations, government agencies, and more that provide financial support for program implementation
4. Faith leaders and ministry partners: leaders in and beyond The Episcopal Church

Peripheral Audiences
1. Implementing partners: faith-based and secular community organizations, NGOs, and other entities that collaborate on the ground to implement programs and deliver services
2. Individuals beyond the faith-based community: those whose values align with ours but are not part of The Episcopal Church (or other faith group)
3. News and media publishers: both professional journalists and thought leaders
4. Other peers in the global development sector: NGOs, local governments, etc.

Project Scope & Requirements

Below are the expected components of Parts 1 and 2 of this project. We invite agencies to submit a proposal for either or both project parts. The maximum budget for Parts 1 and 2 is $350,000.

Part 1 Scope: Website Redesign
We expect the website redesign to include four phases, described below. We suggest outcomes for each phase, but are open to other well-reasoned approaches and activities. For additional information, agencies may request access to our Features & Functionality Roadmap by completing this form.

Project Phases
1. **User Research:** While we have completed some user research, the website strategy may benefit from additional audience research to fill gaps in our understanding of direct audiences' motivations. Activities / deliverables could include: user interviews, focus groups, surveys, persona and journey map development.
2. **Content Strategy:** Development of a content strategy and information architecture that aligns with the website goals and engages target audiences, refined by user testing. Activities / deliverables could include: content framework, sitemap, taxonomy, page definitions or diagrams, content entry.

3. **Visual Design:** A modern, responsive, user-friendly design that reflects the brand, aligns with website goals, and engages target audiences. Activities / deliverables could include: creative direction, style tiles or design snapshots, wireframes, responsive design systems.
4. **Web Development:** A CMS built to reflect and enable the content strategy, information architecture, and visual design strategy that allows easy updates and management by staff. This phase also includes automated content migration and user testing. Activities / deliverables could include: solution architecture, technical specifications, front- and backend development, quality assurance testing, launch, post-launch support.

We also invite estimates for the following activities:
1. Content creation support
2. Ongoing website maintenance support
3. Staff training in content evaluation, accessibility best practices, SEO best practices, and/or CMS use

Platform Features & Functionality
1. **Templates:** Templates that would accommodate our existing content and growth goals include: homepage, article, bio, campaign, detail, event, list results page, press release, report, resource, and story.
2. **Components:** The new site should account for about 40-60 modular components across templates.
3. **Integrations & connections:**
   a. 2-factor authentication: The new site needs to continue to provide 2-factor authentication for CMS users.
   b. The Episcopal Asset Map needs to be embedded on the new site, but does not need to be redesigned.
   c. Donation forms: These can be links off-site. See Part 2 for donation form needs.
4. **Additional offsite links:**
   a. E-newsletter
   b. Social fundraising (Classy) pages
   c. Social media accounts

Part 2 Scope: Donation Platform Selection & Setup
For this project, an agency will lead the research and requirements gathering to identify and implement a new online fundraising platform that could be used for general fundraising, cause or program-specific fundraising, and disaster relief fundraising.

Project Phases

1. User research: Engage key stakeholders to gather feature and functionality requirements, such as in-house creation and management of rapid-response donation forms.
2. Research and evaluation: Identify 3-5 options for our organization and an analysis of the strengths and drawbacks of each option for our team to consider.
3. Implementation: Create the initial templates and complete integrations with our systems to allow for a simplified user experience for both donors and staff. Migrate recurring donor data. Oversee a handoff to our team.

We also invite estimates for the following activities:
- Hosting services
- Post-launch ongoing support
- Additional training on the selected tool

Proposal Requirements

Please include the information below in your proposal. Agencies interested in both project parts may submit one integrated proposal.

1. **Cover page:** Proposal for [Part 1, Part 2, or Parts 1 & 2]
2. **Project approach:** A summary of how you would approach this project to deliver it on time and on budget. Please describe major project phases, each with a description of planned activities, outcomes, and duration.
3. **Technical approach (Part 1 only):** We are open to redesigning our website on WordPress, Drupal, or another CMS. Please explain which CMS you would use and why it would be a good fit for our team.
4. **Estimated timeline and budget:** Major project phases and a breakdown of costs by phase. As needed, indicate which activities are optional and why.
5. **Company and team:** Explain the capabilities, experience highlights, and core values of your company. Include an introduction to each person who would be part of the project team, including role, subject matter expertise, and relevant experience.
6. **Case studies:** Include up to 3 case studies of similar projects with purpose, process, and outcomes for each.
7. **References:** 3 references, with name, organization, position, year(s) worked together, and contact information.

Proposal Evaluation Criteria

We will evaluate proposals against the following criteria:
1. Agency Expertise
2. Agency Experience & Makeup
3. Approach & Methodology
4. Creative Strategy & Design Expertise
5. Development Capacity & Expertise
6. Estimated Budget & Timeline

Evaluation Team

Project Sponsor: Gillian McCallion, Vice President, Marketing & Communications
Gillian will oversee major strategic, financial, and cross-organizational communication needs and decisions.

Project Manager: Chris Leo Palermino, Web Marketing Manager
Chris will oversee the day-to-day operations and decisions that keep the timeline, budget, and project priorities on track.

Additional Reviewers: Judy Sawler, Director, Direct Marketing; Betsy Deisroth, Vice President, Advancement
Judy and Betsy will represent the donors' and organizational fundraising needs.

Submission Instructions

Please email your proposal to: communications@episcopalrelief.org
Subject line: Digital Experience Redesign Proposal [Part 1 / Part 2]: Agency Name
Proposals are due by 5 p.m. ET on October 31, 2024.