1. Summary

1.1. PROJECT SUMMARY
America’s Charities is accepting proposals from outside vendors to redesign the existing America’s Charities website (www.charities.org). The current website was redesigned in 2014, moving to a responsive layout and focused on communicating content and services to three audiences: employers, nonprofits, and individual donors. In the more than 8 years since the last website redesign, America’s Charities’ mission and core service offerings have evolved and the purpose of our website has shifted significantly. Additionally, our website is powered by Drupal 7, which will reach its end-of-life November 1, 2023, making it imperative that we redesign our website to ensure our website continues to be well-maintained, secure, and stable. America’s Charities is looking to redesign its Website and revise the information architecture, to focus the organization and usability of the website on lead generation, improve the way we display social proof (logos, testimonials, stats) and our thought leadership (white papers, case studies, blog posts/articles, webinars), and make it easier for colleagues with little-to-no website experience to play a role in contributing and updating content.

1.2. ABOUT AMERICA’S CHARITIES
Empowering employers and their employees to help each other and the community around them is at the heart of everything America’s Charities does. As a 501(c)(3) tax-exempt public charity, America’s Charities has raised and distributed more than $800 million for more than 25,000 nonprofits globally through the workplace giving, matching gifts, and volunteer programs we manage each year for corporate, federal, state, and local government employers. These campaigns provide a critical source of unrestricted, sustainable funding nonprofits rely on each year to keep their doors open and address a wide range of causes including education, environmental protection, human and civil rights, hunger, poverty, research and health services, animal welfare, veteran assistance, and disaster relief. In addition to facilitating charitable giving initiatives that support nonprofits, including America’s Charities alliance of 100+ of the nation’s most reputable 501(c)(3) organizations, we help companies support their workforce financially through Employee Assistance Funds (EAFs). Since piloting its EAF services to a handful of businesses in 2019, America’s Charities has grown this new service substantially facilitating more than 150 new Employee Assistance Funds (EAFs) for employers to date, managing more than $20 million in grants designated to help employees cope with unexpected hardships. At the end of November 2022, America’s Charities launched another new service offering (similar to our EAF services), adding Scholarship Program application and grant management to our portfolio of employer-focused solutions.

2. Background and Project Purpose

2.1. WHY ARE WE DOING THIS?
First and foremost, we need to ensure our website remains active, supported, and secure come November 1, 2023 when Drupal 7 reaches its end-of-life.

Secondly, we need to optimize our website to more easily support and promote our new mission and business objectives which have shifted significantly in the last 5 years.
America’s Charities celebrated its 40th anniversary in 2020. We were founded in 1980 by nonprofits who wanted better representation and access as charitable choices in the CFC (the federal government’s workplace giving campaign, which was the largest campaign of its kind at the time). In 2002, private sector employers asked us to manage their workplace giving campaigns, so we pioneered an online donation platform called PledgeFirst, which was the first of its kind to facilitate employer workplace giving campaigns. Jump ahead to present day, the online donation technology space has exploded and there are infinitely more technology platforms, payment methods, and other forms of giving available to employers, nonprofits, and individual donors inside and outside of the traditional workplace. As such, America’s Charities has expanded its business model with new service lines to better diversify our revenue streams and meet the ever changing needs of clients; we’ve partnered with tech experts to offer clients a broader selection of state-of-the-art giving, granting, and engagement solutions; and beginning December 2022, we will be announcing a new mission and vision, which our Board of Directors approved in August 2022.

Our new mission, “Mobilize the power of giving to improve the world,” and our new vision, “A shared culture of impactful giving,” were created to better reflect our organization’s evolved direction and image, as well as guide our strategic priorities and service offerings.

While our current website has served its original purpose of generating awareness about workplace giving and sharing stories about our nonprofit members’ and clients’ impact, it was not designed for lead generation and driving sales which are now the primary uses for the site.

Due to the variance between what the website was originally designed for and what we need it to do now:

- It has become hard to navigate
- It has an outdated appearance
- The site search tool needs adjusted to give more weight to content such as blog posts, white papers, and product offerings rather than our nonprofit member charity profiles.
- Has a lot of good content, but it’s not as organized and easy-to-find as we want
- Is hard for employees who lack website savvy to update content
- For those who are website savvy, it’s still hard to do simple things. For example:
  - In order to place an image within the body of articles and put a margin/white space around the image to separate it from text, our team must either manually enter html code to add a margin or add a margin around an image in Photoshop before loading to the site
  - Anywhere on the site where we need to place a lead generation form, the form has to be entered in “unfiltered rich text” format in order to work. If that format gets changed to something like ‘rich text’, the form breaks and no longer works. This has resulted in people unfamiliar with the site setup going in to edit other content on the page where the form is located and accidentally breaking the form.

2.2. Objectives

- Keep brand authority and online presence strong (despite the outdated website appearance and navigation, we have built a lead generation machine through the content we’ve written and excellent SEO that we don’t want to hamper during the website redesign)
- Solidify consistent, modern design and uniform appearance
- Site content should utilize the full width of the web page
- Create an engaging and easy to navigate experience that still promotes our nonprofit member services, but puts the employer audience front and center
2.3. Key Audiences & Benefits

<table>
<thead>
<tr>
<th>Audience</th>
<th>Type</th>
<th>Benefits of redesign to audience</th>
<th>Impact on America’s Charities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Private sector companies and local, state and federal governments (ranges from C-suite to coordinator/manager level professionals)</td>
<td>External</td>
<td>Easier to find and learn about our philanthropic expertise and how our services empower successful corporate and employee-driven social impact; make it easier to share nonprofit information and social impact content for companies to leverage in their programs; less click-throughs to services/easier to request information/demo</td>
<td>Increase visibility in new industries, generate more clients, and greater client and nonprofit member satisfaction</td>
</tr>
<tr>
<td>*We will provide detailed personas to the website developer who is awarded this contract</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>America’s Charities Nonprofit Members</td>
<td>External</td>
<td>Learn about our programs and services designed to help nonprofits leverage their corporate and donor relations and diversify their revenue streams through participation in public and private sector workplace giving and employee engagement programs</td>
<td>Clarity on the type of services we offer nonprofits and streamline process for attracting qualified nonprofit member leads</td>
</tr>
<tr>
<td>Business Development and Board Directors</td>
<td>Internal</td>
<td>Improved site navigation with a focus on the employer audience will make it easier for our Business Development team and Board to direct potential prospects to helpful resources and content on our site</td>
<td>Website will serve as a sales tool to help drive client sales and empower our Board to more easily share information about our services with their networks</td>
</tr>
</tbody>
</table>

3. Project Scope

3.1. Requirements

- HTML5, WCAG 2.1, ideally Level AAA (level AA as a minimum), standards compliance
- Mobile-optimized design: Consistently responsive - mobile first, then desktop design
- Modern best practices and simple, maintainable markup and CSS
America’s Charities Website Redesign Request for Proposal

- Integrates with existing America’s Charities-maintained back-end services (e.g. database of clients, members, donors) and CRM (currently use ClickDimensions/StratusLive; in process of finding a new CRM which may or may not be ready for implementation until after website redesign is complete)
- Testing throughout the process

3.2. SERVICES

Bids should include cost estimates for the services America’s Charities is seeking outside vendors for:

**Design**
- Information Architecture / wireframes (New website infrastructure)
- Visual Design support
- Adopt, or define & draft a website governance document / project specification / design system
- Mobile/responsive design
- Style sheets and templates
- Integration

**Integrations**
- Google Tag Manager and Google Analytics (we will be moving to Google Analytics 4 in Q1 2023) – will need help making sure this is setup correctly on new website since this is used to help track conversions in our Google Adwords for Nonprofits account
- Click Dimensions is our current marketing automation tool, used to collects leads, demo requests, and newsletter subscriptions. Our team is in the process of choosing an alternative solution, but will not know what that solution is before we award this website redesign contract. A top contender we are currently looking at switching to is Hubspot, so would be best if new website can support that integration.

**SEO**
- Organic SEO
- Search strategy

**Development**
- Front-end
- Content strategy
- Content migration
- Browser & Device Testing, Usability testing

**Consulting**
- Advice on which website platform to use – we have been happy with Drupal but are open to advice on alternatives platforms that can support our services and needs
- Migration strategy
- Advice on how to maintain accessibility
- A privacy policy readable by humans
- Project Management
- Ongoing maintenance and future collaboration

**Donation Shopping Cart**
- As a 501c3 nonprofit, we need the ability to collect donations for our organization (see current page we use for this at [https://www.charities.org/charities/americas-charities](https://www.charities.org/charities/americas-charities))
- In addition to collecting donations that support America’s Charities, we also have approximately 100 nonprofit members. Our current site allows donors to use a shopping cart experience to
support multiple member charities in one transaction via one-time credit/debit card. Donors can also support special “Cause Funds” and disaster funds we have created to support specific social issues, natural disasters, and crises. (See how we currently promote and collect money for individual charity members and funds here https://www.charities.org/charities_list). While our new website will no longer allow donors to support individual member charities through our website, we will need the ability to collect donations to special Cause Funds and disaster funds.

- We will decide whether or not to build this donation functionality into the new website based on how much it will cost. Depending on cost, we may decide to embed a widget from a third party site like Give Lively to support this donation capability.

Quick Start Donation Solution

- Quick Start (see example at https://www.charities.org/quickstart/test-ABC) is a solution we launched in November 2018, using the charities.org site infrastructure. The purpose is to provide a low-cost, minimal effort donation platform with a fast setup time (2-3 business days is typical turn-around), empowering employers of any size company to raise money for charities and/or natural disasters/crises.

- A backend reporting tool was created to support Quick Start, making it easy for our team to pull donation reports by client name, providing basic information including donor name and contact information, donation amount, and which charity was supported. A challenge we have had with the current reporting is it pulls in all activity (both failed and successful), so our team has to download the report and manually sift out the failed/incomplete donations so duplicate donation totals don’t get reported.

- We will decide whether or not to build the Quick Start solution into the new website based on how much it will cost. If we build it into the new site, the solution must do everything it currently does now. We would like the selected web developer to resolve the backend reporting issues noted above. Plus, we would like cost estimates for adding new functionality, such as designing the reports in a way that empowers clients to pull their donation reports themselves (not relying on our team); creating the option for clients to display a donation thermometer on their page; and allowing donors to check a box to select a charity to support without having to actually donate money out of pocket to the charity (the checkbox would be a way for us to report back to the client a charity designation for the company to send money to).

America’s Charities will provide:

- Oversight team to guide direction of design, navigation, and content strategy
- Photos, graphics, and other media like videos
- Copy and messaging for all site pages and content
- Feedback on information architecture and handling of legacy content, back-end integration
- Draft style guide

4. Timelines and Budget

Budget:
America’s Charities’ total budget for this project is $50,000.

RFP timeline:
- November 2022 – announcement of RFP
- December 2022 – bids due no later than midnight December 31, 2022
- January 2023 – project awarded and notification sent to all bidders
**Project implementation timeline:**
We have an ambitious schedule. In responding to this RFP, bidders are asked to balance the target schedule, completeness, and quality - and identify tradeoffs where the tight schedule could impact completeness or quality.

- **Mid-to-late January 2023** – kick off meeting: planning begins, approve timeline and work items
- **March – May 2023** – regular check-ins to discuss new site design, content flow, integrations, and implement work
- **June 2023** - Proposed drop-dead date (no new concepts/functionality added)
- **August 2023** – Soft launch (internal/private testing)
- **September 2023** – Launch site!

5. **Proposal Guidelines & Evaluation Criteria**
Please submit a written proposal to Sarah Ford by e-mail to sford@charities.org no later than midnight CT December 31, 2022.

Bidders need to include line items, rates, resources, expenses, and estimate vs. cap. Please, itemize to explain how your fees break out for each aspect requested in this RFP. Of particular note are fees for development of the Quick Start solution described in the Project Scope section. After we receive all bids, we will determine whether or not to include or exclude the Quick Start solution as we move forward with the new website design.

Copyright: The contractor agrees to assign to America’s Charities all rights, title, and interest, including copyright, in all data, intellectual property, and copyrightable information developed by the contractor in performance of this project.

We may wish to schedule meeting time with bidders individually before awarding the project. The oversight team will look at costs, review portfolios, compare how the proposals are presented, and how close they are to what the RFP identifies.

America’s Charities will evaluate all proposals based on the following criteria:

1. **Overall proposal suitability:** Proposed solution(s) must meet the scope, requirements and needs included herein and be presented in a clear and organized manner.
2. **Organizational Experience:** Bidders will be evaluated on their experience as it pertains to the scope of this project.
3. **Previous work:** Bidders will be evaluated on examples of their work, notably, bidders must have a demonstrable ability to produce accessible websites and experience with a variety of lead capture site integrations. Previous experience working with and knowledge of America’s Charities website infrastructure is a plus.
4. **Value and cost:** Bidders will be evaluated on the cost of their solution(s) based on the work to be performed in accordance with the scope of this project
5. **Technical expertise and experience:** Bidders must provide descriptions and documentation of staff technical expertise and experience.

Language: English must be used for proposals and milestone publications.