The ROCKEFELLER FOUNDATION

REQUEST FOR PROPOSAL: Website Discovery, Design and Development

Proposals due: June 22, 2021

All questions and correspondence should be submitted in writing to Silvia Mansur, Managing Director, Digital Content Engagement and Strategy, RFP_Webplatformppispx@rockfound.org.

BACKGROUND

The Rockefeller Foundation, founded in 1913 by John D. Rockefeller, is a pioneering philanthropy built on collaborative partnerships at the frontiers of science, technology, and innovation to enable individuals, families, and communities to flourish. We work to promote the well-being of humanity and make opportunity universal. Our focus is on scaling renewable energy for all, stimulating economic mobility, and ensuring equitable access to healthy and nutritious food.

THE RFP PROCESS

As part of the due diligence effort, all applicants should be aware the RF will keep top-of-mind, selection of organizations that fall under the WMBE (Women-owned, Minority-owned Business Enterprise) certification as well as socially and environmentally aware businesses. The Foundation's position is to consciously solicit Black, Indigenous, and People of Color (BIPOC) vendors and those of the LGBTQ community to present their qualifications in consideration of the opportunity. At the same time, selection will also be based on the organization that is best positioned to be awarded the project.

We ask that you complete the form at the link provided below.
https://rockfound.box.com/s/1q7harfr4g7c9d0ocgqd8ky0b2s12brs

PROJECT SUMMARY

Building on current efforts and long-standing programs, in October 2020 The Foundation announced the expansion of investments on two key areas: catalyzing billions of dollars in private and concessional investments to scale distributed renewable energy across developing countries; and ensuring more equitable access to Covid-19 tests and vaccines, science-based tools, and data to fight the pandemic, while strengthening public health systems to prevent future outbreaks.

These initiatives are culminating with a Q4 2021 launch of two independent organizations: The Pandemic Prevention Institute (PPI – *preliminary name*) – planned to launch in October 2021; and Smart Power X (SPX – *preliminary name*) – planned to launch in early November 2021.

As fully independent organizations, each of them will require an independent web platform. The discovery, design and development of these two web platforms is the main purpose of this RFP.

About the Pandemic Prevention Institute (PPI) - *Preliminary Name*

We are working with a coalition of organizations to build an apolitical pandemic prevention institute that will use data insights to help the world contain any potential pandemic threat within 100 days of an outbreak. The institute will share early warning signals, aggregating data from a variety of different sources, translating that data into actionable insights, and facilitating information sharing across borders so countries can quickly target interventions where they are needed most before it's too late. Building on existing global systems and working together with a diverse set of public and private partners, the institute will help ensure the global community works as one to stop the next pandemic in its tracks.
Planned Launch: October 2021

About Smart Power X (SPX) – *Preliminary Name*

An expanded commitment to ending energy poverty now will create a powerful movement that allows countries to leapfrog into a more digitally enabled, gender-equitable, and climate-smart economic future. Now is the moment to harness this collective ambition via a new $1bn global platform, "Smart Power X" (SPX – Preliminary Name). In launching SPX, the Foundation will position energy at the nexus of development and action on climate change, and thereby lay the groundwork to ultimately frame it as a new model for global development. SPX will deliver tools, products, and services across three core business lines to expand energy connections, increase consumption rates of energy for productive purposes, and drive economic growth. These include: (1) Country Programs: Support design of scalable, high impact DRE programs in priority markets. SPX will develop viable national markets for DRE solutions by enabling stronger policy and regulatory conditions, facilitating smart subsidies to attract private players, and coordinating investments that stimulate demand and amplify economic impact (e.g., agriculture value chain and SME projects). (2) Projects & Transactions: Deploy concessional capital to de-risk large scale commercial DRE investments. SPX will support project development for large DRE deals, drive down project costs via pooled technology procurement and innovation, and scale financing for these by leveraging resources from key investment partners (e.g., DFIs). (3) Data, Knowledge and Advocacy: Mobilize global action through advocating best-in-class solutions. SPX will support world-class data analytics and demonstrate the commercial and development case for investing in DRE as a core energy, development, and climate change strategy.
Planned Launch: early November 2021

PURPOSE AND APPROACH OF THIS RFP

RF seeks a full-service interactive agency to conduct discovery and to develop the web presence of PPI and SPX. The vendor will work with the Digital Engagement, Content and Strategy team, in coordination with other internal stakeholders, to conduct a series of activities to better understand how the organization envisions its web presence, and to design and develop each of the web platforms.

Naming for both PPI and SPX are underway, as well the development of their brand identity and logos. The Rockefeller Foundation is also undergoing a brand architecture effort that will help inform the extent to which RF's brand identity should inform the visual directions of PPI/SPX. These inputs will be provided to the winning agency.

It is important to note that the scope of work for PPI and SPX, although happening in parallel to maximize efficiencies, will result in completely independent web platforms and are overseen by separate staff teams. As such, the agency should keep in mind that the SOW entails the development of two separate websites: one for SPX and one for PPI. Therefore, while efficiencies and synergies are expected, all key deliverables of this SOW should ultimately be developed and provided in separate for PPI and SPX (vs. combined into one single project), to facilitate reviews and approvals.

Two Phases for Each of the Websites
Phase 1. Discovery Phase: Before we advance onto developing the web platforms, we want to go through a Discovery Phase that will help validate some of our hypotheses and inform development. This phase should produce several outputs that will inform Phase 2.

Phase 2. Design, development and roll-out. Armed with the documented outputs of Discovery Phase, we will kick-off design and development of the web platforms. The support of roll-out should be inclusive of training and maintenance/staffing recommendations.

SCOPE OF WORK

The proposal should be structured in two phases and include at minimum the following activities and deliverables. Other activities and services not outlined below that would help ensure the success of the project and further our goals may be proposed. The narrative should describe your agency's methodologies, the timing and the team roles involved for each stage, along with expectations about participation by Foundation stakeholders.

Phase 1 – Discovery

1. <u>Project Planning</u>: Develop project plan for each website, outlining tasks, deadlines dependencies and owners.

2. <u>Kick-off</u>: Conduct 02 kick-off sessions (one for PPI, one for SPX)

3. <u>Landscape mapping</u> (one for PPI, one for SPX):
   a. Survey RF staff/funding partner organizations regarding current site & future needs (program work & knowledge sharing) – 5 to 8 interviews for each website
   b. Identify key audience personas (up to 5 for each website)
   c. Develop hypotheses of what PPI/SPX should have in each of their websites – e.g. online community needs (separate documents for PPI/SPX)
   d. Survey grantees and partners to validate hypotheses. (8 interviews for each website)
   e. Benchmark against 5 peer organization websites for PPI/SPX each
   f. Due to capacity devoted to ongoing web content production and management, we will not include multilingual requirements as part of the scope of this project, but the site must allow for machine translation (e.g. Google Translate).

4. **> KEY OUTPUT – Insights Report**: Deliver insights report consolidating all findings of landscape mapping.

5. **> KEY OUTPUT - Content Strategy:** based on signed-off insights report, develop 02 content strategy documents (PPI and SPX) that are inclusive of: Content, design, UX and technology for high-impact community engagement, visual storytelling, data visualization, knowledge sharing, public advocacy and engagement, including User journey in a multi-device, multi-platform context; Multi-media considerations on display & consumption; Editorial processes and production workflows; Content policies; roles and responsibilities for Communications, program officers (subject matter experts), grantees and partners and staffing recommendations; guidelines (content, design, UX), training and support.

6. **> KEY OUTPUT –** Development Roadmap with Feature Recommendations, Functional & Technical Requirements to help inform the Development Phase including: Prioritized list of organization and user needs; Documented feature matrix to inform UX and technical website development; Information architecture (IA), site map; User experience (UX) and user-centric design approach; Functional modules; Templates; SEO strategy; Site search appliance.

Phase 2 – Design, Development and Roll-Out

1. **CMS and Hosting Recommendation**: Our initial preference is Wordpress, which we're most familiar with. We will consider other recommendations, with a corresponding recommendation for managed external hosting. The agency should also maintain a development and test environment for user acceptance testing prior to migrations to the production environment.

2. **Design System**: A design system should include a visual design style guide with proposed direction for typography, color palette, & illustrations; photo treatments, and UI pattern library (such as links, buttons, and interactions). We look to the selected agency to recommend the optimal design approach between template or component-based design. It's also critical that we consider mobile templates to be just as important as desktop templates. The website must be mobile responsive. Design deliverables are expected to include a developer-focused style guideline for ongoing work beyond the scope of this engagement. All design must comply with website ADA accessibility standards, to ensure that all users have equal access to information and functionality. A good reference for the accessibility standards that we would like to follow is here: https://www.w3.org/WAI/standards-guidelines/wcag/

   We expect a minimum of three rounds of design: three design concepts in round one; two rounds to fine-tune the chosen design.

3. **Development:** The scope will include all aspects of front and back-end development to implement the features of the new website in the selected CMS, including key integrations outlined under Functional Requirements along with other requirements that may arise from the agency's UX recommendations. The agency will be responsible for all aspects of QA testing, and should detail the QA, UAT and warranty process in the response.

4. **Copywriting:** Please provide estimates for copywriting key landing pages. While this will likely be developed in-house by our Communications team, we may benefit from copywriting support to bring content to consistent voice/tone across multiple pages

5. **Analytics Implementation:** We will need the chosen agency to document the Google Analytics tracking code specifications for the CMS, implement tracking corresponding to identified KPIs, and conduct testing on implementation to ensure full data capture.

6. **Photos:** The Rockefeller Foundation has a digital assets library (media.rockefellerfoundation.org) with thousands of high-quality images. The agency will be provided access to our library for images browsing and sourcing. Our grantees might

also be a source of imagery, and The Foundation can help mediate access to their imagery where applicable. Where desired imagery does not exist from the first two sources, the agency would look into third party photo & video assets banks and propose imagery to be used.

7. **Documentation and Training:** The chosen agency will be responsible for documentation and training for CMS end users (editors) and for developers and technical administrators. The Foundation expects that there will be up to 03 regular CMS end users for each web property. The agency should propose a training program tailored to the needs of the organization, which should include practical documentation for both editors and administrators corresponding to the specific solutions that have been developed. We also expect content workshops to be in scope, teaching The Rockefeller Foundation staff how to create copy optimized for new templates and use best practices to write for the web.

8. **Deployment:** The chosen agency will be responsible for planning and managing the process to launch the website, which should be detailed in the response and inclusive of quality assurance, leveraging platforms such as Jira. The agency will also be responsible for resolving defects and ensuring uptime and performance for a minimum of 30 days following launch.

9. **Ongoing Maintenance and Support -** It is our preference that the chosen agency would be responsible for ongoing support of the website and should propose a maintenance and support budget with defined Service Level Agreements.

10. **Cyber-Security -** The chosen agency should submit a cyber-security outline including but not limited to: access controls, logging and alerting, a vulnerability assessment and general best practices.

Proposal requirements + timeline

The proposal should address each of the topics outlined below.

1. Approach
    a. A detailed description of how your agency will help the Foundation achieve the outlined goals (project summary).
    b. A detailed description of the services to be provided including the planned methodology.
2. Cost
    a. Total cost of this project, broken out by task/deliverable

b. Total cost of pass-through expenses
c. Your hourly rate, including whether this is a discounted rate for nonprofits
d. Discussion of items we should budget for that you did not see in our project summary

3. Proposed Timeline
   a. Detailed proposed timeline for this project (bearing in mind a full launch of PPI in October, and full launch of SPX in early November)
   b. The amount of time each task/deliverable will take to complete
   c. Your availability for starting this work
   d. Discussion of the points of participation for the Foundation team and time allotted for each activity

4. Qualifications
   a. Summary of the firm's organization history, number of full-time staff, location of headquarters, and location of staff included in the bid.
   b. Staff that will be working on the project, including short bios and experience with nonprofit institutions. Please include the project manager that would be working on this engagement.

5. Case studies
   a. Descriptions of three relevant projects, at least one of which was developed in the proposed CMS.

6. References
   a. Three client references with phone and email information, including at least one from the case studies.

RFP TIMELINE

Estimated timeline

The timeline for the RFP process is as follows:

RFP issued	June 8
Agency questions due	June 11
Answers to questions provided	June 15
Proposals due	June 22

Finalists notified	June 25
Finalists Presentations	June 28-29
Agency selected	July 1

SUBMISSIONS

Proposals must be submitted via email to the contact person and address below. Vendors must submit one copy by June 22 to:

Silvia Mansur, Managing Director, Digital Content, Engagement and Strategy
RFP_Webplatformppispx@rockfound.org

TERMS AND CONDITIONS

Reservation of Rights
The Rockefeller Foundation reserves the right to reject any or all proposals submitted if it is deemed to be in the best interest of The Rockefeller Foundation. The Rockefeller Foundation reserves the right to check the accuracy of all information and to request supporting documents. Respondents who provide inaccurate information can, at all times, be excluded from the RFP process.

Confidentiality
The Foundation reserves the right to require any respondent to enter into a non-disclosure agreement.

Costs and Ownership
The RFP does not obligate the Foundation to pay for any costs of any kind that may be incurred by you or any third parties, in connection with your response. All responses and supporting documentation shall become the property of the Foundation, subject to claims of confidentiality and copyright in respect of the response and supporting documentation.

Intellectual Property
You should not use any intellectual property of the Foundation including, but not limited to, all logos, registered trademarks, or name of the Foundation, at any time without the prior written approval of the Foundation.

Responses

All accepted responses shall become the property of the Foundation and will not be returned.

Governing Law

This RFP and your response to it shall be governed by the laws of the State of New York.

No Liability

The Foundation shall not be liable to any respondent, person, or entity for any losses, expenses, costs, claims, or damages of any kind:

- Arising out of, by reason of, or attributable to, your response to this RFP; or
- As a result of the use of any information, error, or omission contained in this RFP document or provided during the RFP process.

Privacy

Personal information collected from any respondent is subject to The Rockefeller Foundation's privacy policy, available at http://www.rockefellerfoundation.org/privacy and will be used by The Rockefeller Foundation in accordance with its privacy policy. For international respondents, please be aware that the information submitted is collected in the United States of America. In addition to being subject to The Rockefeller Foundation's privacy policy, the collection, storage, and use of a respondent's personal data will be subject to U.S. laws and regulations, which may be different from the laws and regulations of other countries. By participating in this RFP, the respondent consents to this collection, storage, and use.

Entire RFP

This RFP, any addenda to it, and any attached schedules, constitute the entire RFP. In the event that it becomes necessary to revise any part of this RFP, the Foundation will contact all respondents.