



ROBERT R.
McCORMICK
FOUNDATION

Website Redesign RFP

Release date: March 23, 2020

Submission deadline: April 3, 2020

Prepared by



Contact Information:

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Contents

Cover Letter.....	3
I. Instructions and Schedule	4
Instructions	4
RFP Schedule.....	4
Administrative Information	5
II. Introduction and Background	9
Mission	9
McCormick Foundation staff for this project	9
About the current website and technology	9
III. Project Summary and Objectives.....	10
IV. Site Content and Functionality	11
Required New Functionality.....	11
Required of new CMS	12
V. Designing for the Customer Journey and Integration.....	12
Audiences.....	12
Nonprofit Organization User Journey.....	12
Individual User Journey.....	13
Careers	13
Search.....	13
Home page.....	13
Other.....	13
VI. Content Mapping	13
VII. Vendor Questionnaire	14
IX. Appendices.....	14

March 23, 2020

To: Interested Parties

From: Kevin Ordonez
Managing Director, Technology Strategy, .orgSource
On behalf of the Robert R. McCormick Foundation

CC: Phil Zepeda
Director of Communications
Robert R. McCormick

RE: Robert R. McCormick Foundation Website Redesign RFP

The Robert R. McCormick Foundation is seeking bids to redesign its website. The focus of our evaluation will be your responses to the proposal questions in this document. Please provide your responses using the online form. The link and instructions are below.

Based on responses provided to this RFP, McCormick Foundation staff will select vendors to make presentations during the week of **April 13**. McCormick Foundation anticipates selecting a vendor finalists the week of **April 20**. Vendor meetings and contract negotiations are anticipated for the last week of April.

Project implementation is expected to kick-off in **mid-to-late May** with the launch of a new website no later than October 1, 2020.

If you have questions about the content of the RFP or McCormick Foundation's requirements, please direct them to me at kevin@orgsource.com. We look forward to receiving your proposal and evaluating your capabilities.

Best regards,

Kevin Ordonez
Managing Director, Technology Strategy
.orgSource

I. Instructions and Schedule

Instructions

1. Following the format provided will ensure that your proposal is evaluated accurately and fairly in comparison with other proposals received. If you have any questions about the proposal, how to use this submission form, or the evaluation process, please contact: kevin@orgsource.com
2. Access the submission form here:
<https://form.jotform.com/200655998715165>
3. The form will save to your browser. However, it is advised that you submit the form after each session, even if incomplete. You will be provided with an edit link onscreen and via email that you can use to edit the form. This link may be shared with colleagues. However, only one person should be in the form at a time. You may edit the form an unlimited number of times until the submission deadline.
4. Please email any additional supporting information, including examples of your website development work with other organizations, to kevin@orgsource.com.
5. A PDF with the questions asked in the online form is provided as Appendix A for your reference. Note that all responses must be provided on the online form.

RFP Schedule

The following is a list of the activities relevant to the RFP process. McCormick Foundation reserves the right to change these dates and will notify vendors in such a case.

<u>Activity</u>	<u>Date</u>
RFP to vendors	March 23, 2020
Vendor intent to bid due via email	March 26, 2020
Vendor questions due	March 30, 2020
Proposals due at 5 00 p.m. CT	April 3, 2020
Vendor demos	Week of April 13
Vendor follow-up	Week of April 20
Vendor finalist(s) selected	Week of April 20
Vendor contract negotiations	Week of April 27
Launch of new website	No later than October 1, 2020

NOTE: All material and information provided shall be regarded as confidential information. Likewise, all materials contained within your formal proposal, as well as the materials and information distributed during the vendor presentations, will be treated confidentially. This information may, however, be made available to all project team members, board members and consultants retained to assist in the evaluation process.

Administrative Information

1.1 Contact Information

All correspondence concerning this RFP and questionnaire should be directed to:

Contact Information:

Kevin Ordonez

Managing Director, Technology Strategy

.orgSource

kevin@orgsource.com

630.697.5141

Vendors who solicit information about this RFP from other sources, either directly or indirectly, will be disqualified.

1.2 Questions

Please submit questions via email. All questions will be answered promptly. Refer to the RFP schedule for the deadline for questions.

1.3 Intent to Bid

Each vendor must send its intent to bid to the email address specified in Section 1.1. no later than 5:00 p.m. CT on the date specified. Vendors who do not email their intent to bid will be disqualified from further participation in this process.

1.4 Questionnaire Format

Vendors are requested to complete the online the questionnaire by 5:00 p.m. CT on the date specified including pricing and requirements. Start the questionnaire here:

<https://form.jotform.com/200655998715165>

1.5 Late Submission

Proposals and questionnaires submitted after the closing date will not be accepted. McCormick Foundation and .orgSource are not responsible for late delivery or lost delivery of vendor materials. The person duly authorized by the company should complete and submit the proposal on or before the deadline.

1.6 Proposal's Use in Contract

A company's response to this RFP acknowledges that the rights have been reserved to include this RFP and the selected company's proposal in the final contract. Other written material from the company will become a contract exhibit.

1.7 No Press Releases or Public Disclosure

Vendors may not release any information about this RFP. The winning vendor may not issue a press release unless it has been reviewed and approved by the client.

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1.8. Ownership of Materials

All materials submitted in response to this RFP become the property of the client. Proposals and supporting materials will not be returned to vendors.

1.9 Rejection of Proposals

Client reserves the right to reject any or all proposals. Proposals will not be returned to vendors.

1.10 Proposal Costs

Client is not responsible for any costs incurred by the vendor in the preparation of the proposal, the site visit or the live demonstration.

1.11 Errors in Proposal

Client is not liable for errors in vendor proposals. A vendor may correct an error in its proposal with client approval. Changes after the submission date may only be to correct an error in an existing part of a proposal. New material may not be submitted. All modifications or corrections must be submitted by email. No oral, telephone or faxed modifications or corrections will be accepted.

1.12 Evaluation Criteria

Client is interested in obtaining a complete solution to the requirements contained in this RFP. Proposals that meet the proposal instructions and requirements will be given a thorough and objective review. Proposals that are late, do not comply with proposal instructions or take exceptions to mandatory requirements will be eliminated. Proposals will be evaluated using several factors as described below.

1.13 Technical Solution

Primary consideration will be given to meeting the functional requirements as listed in this RFP. The following are factors in the evaluation:

- Meeting the requirements as stated in this RFP.
- Understanding of the work to be performed.
- Technical approach and methodology to accomplish the work.
- Completeness and competence in addressing the scope of work.
- Quality Assurance (QA) plan.

1.14 Project Management

Effective project management is essential for a successful implementation. Vendors will be evaluated on the completeness and responsiveness of their project management plans and the project team assigned. As part of the project management plan, vendors must demonstrate adequate experience in developing and implementing similar projects. Confidence in the vendor's ability to meet deadlines and successfully manage similar projects will be a primary consideration. Special consideration is given to

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vendors who propose a detailed project plan with sufficient breakdown of tasks and steps to demonstrate a complete understanding of the project.

1.15 Acceptance Testing

While developing your project plan, you should assume that the client will undertake extensive testing prior to “go live.” These tests include functional testing and user interface testing. The results of these tests will be provided to the vendor with the expectation that any errors or bugs will be corrected prior to final product acceptance.

1.16 Payment Schedule

The contract terms for this work will include a payment schedule based on completion of work.

1.17 References and Demonstrations

Vendor references and demonstrations will be evaluation factors.

1.18 Proposal Content

Proposal contents below are mandatory. Your proposal should contain the following:

Summarization of any reservations, suggestions, recommendations and concerns. This shall include the bidder’s comments and suggestions regarding alternatives to achieve or exceed the required functionality. The focus should be on content completeness and brevity.

Appendices: The following appendices should be included with your proposal:

- Sample contract
- Sample maintenance agreement
- Sample hosting agreement
- Sample licensing agreement
- Sample project timeline to include schedule, personnel and dependencies.

1.19 Alternate Proposals

Alternate proposals in response to this RFP will not be accepted. Great care has been taken to ensure that requirements are functionally stated, and vendors are expected to respond to those requirements with standard products.

1.20 No Referrals and Confidentiality

Vendors may not refer or pass on this RFP to another vendor without approval. This RFP is confidential.

1.21 Confidential or Proprietary Information

Client has no obligation to share proposal material with any other party and will respect any documents or materials that have been clearly marked “Confidential” or

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“Proprietary” by the vendors. However, only those pages that contain the proprietary information should be so designated and the complete proposal should not be marked proprietary or confidential. Client is not obligated to maintain the confidentiality of any information that was known prior to receipt of a proposal or becomes publicly known through no fault of the client or is received without obligation of confidentiality from a third party.

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II. Introduction and Background

The Robert R. McCormick Foundation was established by a bequest from Col. McCormick, one of Chicago's first major philanthropists. It is one of the nation's leading charitable foundations.

Today, the Foundation continues Col. McCormick's legacy with the mission of fostering communities of educated, informed and engaged citizens. Since 1955, the McCormick Foundation has invested more than \$1.5 billion in the areas of journalism, education, social services, civic engagement, and veterans' programs.

The Foundation also oversees Cantigny Park, once the Colonel's estate, in west suburban Wheaton, now a center for recreation, learning and civic engagement that has enriched the lives of millions of visitors.

With more than 60 years of philanthropic giving, the Robert R. McCormick Foundation remains dedicated to building stronger communities.

Mission

The Robert R. McCormick Foundation works with communities in Chicagoland and across Illinois to develop educated, informed, and engaged citizens. Our aim is to assist communities, to strengthen democracy, and help ensure that all families and children have the opportunities they need to flourish.

McCormick Foundation staff for this project

Phil Zepeda, Director of Communications, and Brad Lash, Web Development Manager will be the two primary staff working on this project.

About the current website and technology

McCormick Foundation website is at <https://donate.mccormickfoundation.org/home>. It is hosted on Blackbaud's NetCommunity CMS, which Blackbaud will cease to support. They haven't set a firm date yet, but they've hinted at the second half of 2021.

McCormick Foundation is using Blackbaud Raiser's Edge for donor management. They may upgrade to Raiser's Edge NXT, but probably not until late 2020 at the earliest.

The McCormick Foundation Grants Management System (GMS) facilitates grant applications.

Cvent is used for event registration.

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Blogging is done via the Blogger platform.

About .orgSource

.orgSource transforms organizations and readies them for growth.

We founded .orgSource in 2005 with the mission of fostering associations' success through digital transformation. In the process, our organization has also transformed. We've evolved to be a trusted partner to association leaders who need to develop strategies to meet the challenges of an increasingly unpredictable future.

.orgSource has been retained by McCormick Foundation to facilitate the website vendor selection process.

III. Project Summary and Objectives

McCormick is interested in moving to a WordPress site to be consistent with other websites managed by the McCormick Foundation. The site will be hosted on premise by McCormick. McCormick will manage all maintenance and upgrades, monitor uptime and site load times, and respond to issues.

Redesign of the current site is critical. With this redesign project, McCormick Foundation is seeking a vendor who can provide a contemporary, user-friendly, responsive WordPress website, with a robust search engine, easy to use navigation, and reflective of the full scope of work that the Foundation offers. The ultimate goal is a better end user experience and increased visitor engagement.

In addition, McCormick wants to roll its microsites into the same CMS as its main site. All sites should follow the same design scheme and color palette, but each microsite should be differentiated by a logo, the possible the addition of an accent color and/or vanity url. These sites include:

- Democracy Schools initiative (this is already incorporated in the McCormick site but staff would like to elevate its presence)
- Illinoiscivics.org (pending internal approval)

In addition, Newton, the site McCormick uses to post jobs, will need CSS styling.

The complete site should do more than support donations. It should improve the grant submission process by making it easier to know what grants are available, when they are available, and how to apply. The McCormick Foundation Grants Management System (GMS) facilitates grant applications. The new site should make it easy to access this system to start or continue grant applications.

In preparation for this redesign, .orgSource has performed a detailed site analysis with recommendations for improvement and shared this with McCormick Foundation. McCormick is creating a cross functional team, involving all department stakeholders in the redesign project. McCormick is undertaking a content audit, performing journey

mapping, and soliciting user feedback. The development of a new information architecture will be a joint project between McCormick and the new website vendor.

Primary objectives for the site redesign

- Implement a modern, easy-to-navigate, mobile first website
- Improve user experience: Make it easy for McCormick Foundation audiences to find what they need, understand what the Foundation does, know what grants are available when, donate to the Foundation, and access news and information.
- Streamline navigation
- Provide a defined customer journey
- Improve search across all content and make it easier for users to drill down into the info they're trying to find.
- Improve McCormick Foundation search engine rankings

IV. Site Content and Functionality

Content and functionalities found on the current McCormick Foundation website include the following. For purposes of this RFP, expect this information to be optimized, restructured and rewritten for the new website.

- Information about programs and grants
- Links to the grant applications
- Information about community giving
- How to donate and giving options
- Information about the Foundation, including careers with McCormick

In addition, the microsites mentioned above will need to have their own identities within the broader McCormick site.

Required New Functionality

- WordPress website to be consistent with other websites managed by the McCormick Foundation.
- Fully responsive design, mobile first. In 2019, the website received only 20% of its traffic from mobile. Page layouts, content strategy and restructured navigation should support an improved mobile experience.
- Implementation of updated branding standards
- Reimagining of navigation and organization based on issue areas, initiatives, about us, etc.
- User management to enable workflow
- Searchable grant list

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- Incorporate blog and news item posting into site so McCormick Foundation can eliminate its use of the Blogger platform.
- Incorporation of (and elevated presence for) Democracy Schools initiative.
- Social media integration
- Embedded donation forms
- Embedding of careers postings through Newton
- Add the ability to search only for grants. The grant search history should be trackable for admins.
- Make it easier for staff to update and manage content and use images more efficiently.
- Provide a resource library with 3rd party PDFs, links, content, blog, and news items.
- Embed YouTube videos within the WordPress site
- Add a ShareThis feature for printing content and sharing via social media, email, etc.

Required of new CMS

- Intuitive, easy to use CMS with accurate WYSIWYG
- Ability for staff to easily incorporate graphics into the site.
- Provide staff with easy to use templates and tools that allow them control over how the content appears (e.g. be able to insert graphics with text).
- Incorporate W3C web accessibility guidelines, including resize features.
- Provide tools for staff to easily manage all attachments from the administrative side (e.g. folders, tags, etc.)
- Ability to implement an editorial workflow with multiple stage gates.

V. Designing for the Customer Journey and Integration

The new CMS and website design should significantly improve overall usability. It should be intuitive and easy to navigate.

Audiences

The McCormick Foundation website has two distinct primary audiences.

1. Organizations interested in learning about available grants and applying for them.
2. People interested in learning about or donating to McCormick programs.

Judging by site traffic, there also seems to be considerable interest from people looking for jobs or reviewing the staff and leadership pages.

Nonprofit Organization User Journey

A landing page should feature all of the grant programs with a brief description. Note that the five grant programs operate independently in terms of intake, grants

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management and distribution. Content should be optimized for mobile. The architecture should allow more information to be accessed at a glance. There should be a way to sort, search and filter grants.

Individual User Journey

The site needs more content about the Foundation, its initiatives, programs and areas of focus. Users should also be able to understand all of the funds available for them to donate to at a glance. A landing page should feature descriptions of the funds and links to individual fund pages with more details to help users understand what the funds are, who they help, and how they help before selecting fund to explore. The overarching “Why Give” information should appear on the landing page so that the individual programs are not crowded with that info repeated on each page. Note that a unified donation form for all programs is not an option.

Careers

The Careers page was the second most frequently visited page on the site in 2019. A “Work with Us” link or button should give more visibility to the opportunities to work for the Foundation. The site should be integrated with the Newton software that McCormick uses to manage its hiring process. McCormick staff have admin access to Newton for CSS styling needs.

Search

The search button should be easier to see and use and make search easier overall. When results are clicked on, the site should have breadcrumbs that make it easy to orient the user to where they are at on the website. The addition of filters should make it easy for users to find information about specific grants and programs.

Home page

The home page should offer flexible content wells that contain calls to action and publicize initiatives.

Other

The McCormick Foundation Grants Management System (GMS) will remain as is and does not need any integration other than hyperlinks.

Blogger will be replaced by the new CMS.

VI. Content Mapping

McCormick would like an estimate on content mapping. McCormick staff will migrate content to the new site.

VII. Vendor Questionnaire

Please respond to this RFP by completing the vendor questionnaire. The vendor questionnaire must be completed online. Please begin the process at this link:

<https://form.jotform.com/200655998715165>

Whenever possible, please do not answer by referencing other sections of your proposal. If a particular answer must be referenced in another part of your proposal, please state the specific question number where the answer can be found.

Note that a PDF of the questionnaire is provided as Appendix A so that you may refer to it in preparing your responses. However, all responses must be entered into the online form.

IX. Appendices

- Appendix A: Vendor questionnaire sample