CATHOLIC RELIEF SERVICES

REQUEST FOR PROPOSALS

#US7455 WEBSITE REDESIGN

DESIGN AND IMPLEMENTATION

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Contents

CATHOLIC RELIEF SERVICES .................................................................................................................................................1

1. PURPOSE ........................................................................................................................................................................4

1.2 BACKGROUND ............................................................................................................................................................4

1.2.1 CRS Vision 2030: in their own hands Strategy ...............................................................................................................5

1.3 CRS Departmental background .......................................................................................................................................5

1.4 AGENCY REDESIGN PRIORITIES ...............................................................................................................................7

Priority 1: Private Fundraising ...............................................................................................................................................7
Priority 2: Advocacy & Movement Building .......................................................................................................................7
Priority 3: Institutional Donor Engagement ........................................................................................................................8
Priority 4: Demonstrating Expertise and Commitment to Local Partnership for Non-US Local Organizations and Governments8

2. Summary of Service needs ..................................................................................................................................................10

2.0 Current State .....................................................................................................................................................................10

2.1 Scope of Work ..................................................................................................................................................................11

2.1.2 Scope and Deliverables ...............................................................................................................................................13

2.1.3 Not in Scope .............................................................................................................................................................15

2.2 Timing Considerations ....................................................................................................................................................15

3. Proposal Overview ..........................................................................................................................................................16

3.1 Invitation to Tender Response .........................................................................................................................................16

3.2 CRS RFP Manager ..........................................................................................................................................................16

3.3 Multiple Awards ............................................................................................................................................................16

3.4 Offer Deadline ..............................................................................................................................................................16

3.5 Electronic Submission ....................................................................................................................................................16

3.6 Submission of Offers .......................................................................................................................................................16

3.7 Chronological List of Proposal Events .........................................................................................................................17

4. Proposal Requirements ..................................................................................................................................................17

4.1 Proposal Requirements ................................................................................................................................................17

4.2 Proposal Response Sheet Guidelines ..............................................................................................................................18

4.3 Pricing Consideration ..................................................................................................................................................18

4.4 Rate Cards ......................................................................................................................................................................18

4.5 Validity Period ...............................................................................................................................................................18

5. Evaluation and Basis for Award .......................................................................................................................................18

5.1 Proposal Evaluation .....................................................................................................................................................18

5.2 Evaluation Criteria ......................................................................................................................................................18

5.3 Negotiations .................................................................................................................................................................19

6. General Guidelines ........................................................................................................................................................20

6.1 CRS Code of Conduct and Business Ethics ..................................................................................................................20

6.2 RFP Response Ownership ...........................................................................................................................................20

6.3 Confidentiality of RFP and Responses ........................................................................................................................20

6.4 Agreement to Comply with Applicable Laws ...........................................................................................................20

6.5 Binding Period / No Contract / Severability ...............................................................................................................21

6.6 Disqualification ............................................................................................................................................................21
6.7 Costs and Expenses Associated with the Response ................................................................. 21
6.8 Partnering with Another Vendor ...................................................................................... 21
1.0 Introduction

1.1 PURPOSE
The objective of this RFP is to invite applicants to partner with CRS to transform four of our core websites into an efficient, centralized digital platform that provides a frictionless user journey for our key audiences including donors, advocates and partners. Our new site should maintain an accessible, secure, branded presence with consistent messaging as appropriate for our diverse audiences. Success of this endeavor will be improved outcomes in soliciting donations, driving advocacy actions, communicating the agency’s capacity and impact, and facilitating engagement of targeted audiences with CRS.

In partnership with CRS, the vendor will create a unified website that seamlessly integrates diverse sections of our online presence, maintaining distinct navigation, look and feel, and content types where needed. Emphasizing a single cohesive platform, this project aims to enhance user experience, streamline content management, and improve efficiency.

We invite performance driven and efficient solutions. We value collaboration, creative approaches, and a focus on a consistent user experience. Vendors are encouraged to propose high-level strategies that demonstrate understanding of our vision and a detailed technical roadmap for achieving it. Our goal is to find a partner capable of delivering a unified platform that reflects our objectives.

1.2 BACKGROUND
Catholic Relief Services is the international humanitarian and development agency of the Catholic Bishops of the United States, with programs and services that reach over 140 million people across the globe. Dedicated to a vision that all people reach their full God-given human potential in just and peaceful societies that respect the dignity of every person and the integrity of creation.

CRS programs are based on need without regard to race, religion or nationality. CRS’ humanitarian relief and development work is accomplished through a global presence and network, productive and mutually respectful partnerships, technical expertise across eight program areas, advocacy for policies and practices that promote justice and peace, engagement of supporters in the United States, and many other organizational capabilities of its diverse staff from across the globe.

Supported by a headquarters based in Baltimore, Maryland. CRS operates programs in more than 100 countries, grouped in the following regions:

- Asia
- Europe, Middle East, and Central Asia
- Latin America and Caribbean
- Central Africa
- East Africa
- Southern Africa
- West Africa

Key to CRS’ operations is close collaboration with local Church, civil society, and government partners to achieve shared goals and objectives. CRS places a particular emphasis on accompanying local institutions
in achieving their ambitions to be effective, dynamic and sustainable catalysts for change for the people and communities they serve.

In the United States, CRS engages with Catholic institutions and individuals and others of good will to advance our mission. Activities in the U.S. range from praying for and learning about the particular challenges and opportunities for those living in poverty around the world to fundraising and advocacy to contribute to building a more just and equitable world for all.

1.2.1 CRS Vision 2030: in their own hands Strategy
To advance our mission, CRS’ agency strategy, referred to as Vision 2030, articulates bold goals and targets designed to catalyze transformational change at scale for those living in the most challenging conditions of poverty and vulnerability outside the U.S. The strategy’s five goal areas encompass the range of programming which CRS and its partners carry out. Each goal area reflects the evolving needs and capabilities of the people we serve and our over 2,000 local partners.

1.3 CRS Departmental background
The Marketing and Communications (MarCom) division promotes and enhances the CRS brand and communicates the impacts of the agency initiatives to key audiences such as Catholics in the United States, institutional and individual donors, and government officials.

MarCom plans and executes CRS strategy-specific communications and campaigns. MarCom works collaboratively on campaigns, conferences and projects. MarCom drives awareness, engagement and fundraising for CRS by creating and distributing ads, videos, websites, marketing materials and direct response mailings while generating major media coverage.
In collaboration with our internal stakeholders, the Digital Department within MarCom produces and manages the content for agency websites and email marketing communications. Currently, the Digital team supports CRS.org and over 35 other web properties.

| US, Fundraising, and OverOps |  
| --- | --- |
| Catholic Relief Services |  
| CRS Español |  
| **US** |  
| 75th Anniversary |  
| Annual Report |  
| Global High School |  
| CRS Onboarding |  
| CRS University |  
| CRS Virtual Votive |  
| CRS Materials |  
| CRS Rice Bowl |  
| CRS Helping Hands |  
| CRS Brand Store |  
| **Fundraising** |  
| CRS Secure / support.crs.org |  
| CRS Gift Catalog |  
| Go FAR |  
| Donor Portal / my.crs.org |  
| **OverOps** |  
| Coffeelands |  
| Changing The Way We Care |  
| CRS ASA |  
| CRS Compass |  
| CRS OVC |  
| Integrated Nutrition Conference |  
| CRS SOCY |  
| CRS Vulnerable Children |  
| Smile Project Nigeria |  
| CRS JWBG |  
| CRS RFSP |  
| Institute for Capacity Strengthening |  
| Vatican Impact Investing Conference |  
| Emergency Field Operations Manual |  
| Farmer-to-Farmer |  
| ICT4D Conference |  
| Response Builder |  

**FIGURE 1: CRS WEB PRESENCE SUPPORTED BY DIGITAL**

The Digital team works collaboratively on campaigns and other projects with several agency departments including, but not limited to:

- **Overseas Operations** (OverOps) – Implements program activities and operations to ensure fulfillment of the agency’s mission and strategy.

- **Mission and Mobilization** (M2) – Affects transformational change at scale for the world’s most vulnerable through influencing U.S. systems and structures and increasing private resources by building a movement of individuals.

- **Charitable Giving** (CG) - Engages U.S. Catholics and others of goodwill who share in the Church’s “service of charity” to poor and vulnerable people outside the U.S. The division serves approximately 300,000 active donors who have given within the past 12 months, over 90% of whom are Catholic.

Each department has a team focused on Hispanic development, marketing, advocacy and outreach. For more than 15 years, CRS has been steadfastly committed to developing initiatives aimed at reaching the Hispanic audience in the US. Hispanic Catholics are a priority audience for CRS due to their representation as the segment with the most significant growth among the Catholic population in the US. According to Pew Research (2023), Catholics remain the largest religious group among Hispanics, accounting for 43% of the population. Furthermore, more than half of Hispanics who identify as Spanish dominant also identify as Catholic (56 percent). As a result, CRS sees the Hispanic audience as an
opportunity to grow its donor base and fulfill its strategic goal of diversifying and expanding resource mobilization.

1.4 AGENCY REDESIGN PRIORITIES

CRS leadership has identified agency priorities, tied to our CRS Vision 2030, to inform the redesign project. Future state requests will be prioritized based on the following order:

Priority 1: Private Fundraising

Engaging with audiences in the U.S. to build relationships with donors including identifying prospective donors and cultivating, soliciting and stewarding current donors.

- **Outcome:** Facilitate increased revenue from individual donors.
- **CRS Vision 2030 Goal Area:** Expand and Diversify Resource Mobilization
- **CRS Activities:** Content development and maintenance, metrics capture and review, email campaign planning, external acquisition channels and follow-up dependency content generation, etc. *Offering an action that encourages a web visitor to share their e-mail address so they can begin a direct relationship with CRS. Offering videos that cultivate a stronger interest in CRS’ mission. Sharing stories that show how gifts to CRS are well stewarded and deliver impact for those we serve.*
- **Presumed audiences:** Individuals (Hispanic and Non-Hispanic) in or from the US who may be: Current Individual Donors, Potential Individual Donors, Current Mid-Level Donors, Potential Mid-Level Donors, Current Major/Leadership Giving ($25k per year), Potential Major/Leadership Giving ($25k per year), Current Principal Gifts (over $500k per year), Potential Principal Gifts (over $500k per year), Current Planned Giving Donors, Potential Planned Giving Donors, Lapsed Donors. Hispanics in the US are a priority audience for growth.
- **Measurable user actions:** onetime donations, recurring monthly donations, email sign-ups, time on page, rate of donation or sign-ups related to specific content, planned giving contact, planning a bequest to CRS, fundraising via DonorDrive, etc.

Priority 2: Advocacy & Movement Building

Engaging with audiences in the U.S. to facilitate advocacy actions and chapter activities.

- **Outcome:** Facilitate increased advocacy actions, chapter activity and general support for our work.
- **CRS Vision 2030 Goal Area:** Catalyze Humanitarian and Development Outcomes at Scale & Mobilize Catholic Church and others to Take Action to Combat Global Poverty, Injustice and Violence
- **CRS Activities:** Content development and maintenance, metrics capture and review, email campaign planning, external acquisition channels and follow-up dependency content generation, etc.
- **Presumed audiences:** Individuals (Hispanic and Non-Hispanic) in or from the US who may be: Current Advocates, Potential Advocates, Current Chapter Members/Leaders, Potential Chapter Members/Leaders, Current Club Leaders (HS Staff), Potential Club Leaders (HS Staff), Coalition Partners, Parish/Diocese/Educators, Current Rice Bowl Participants, Potential Rice Bowl Participants.
• **Measurable user actions**: digital advocacy actions completed, additional advocacy actions reported via the online reporting tool, chapter membership, download of materials, time on page, rate of sign-ups related to specific content, outreach to M2 contacts, etc.

**Priority 3: Institutional Donor Engagement**

*Engaging with institutions internationally to increase funding opportunities, steward relationships, demonstrate capacity, and foster growth of existing programs.*

• **Outcome**: Facilitate increased engagement and relationship cultivation with potential and existing institutional donors by improving knowledge of CRS’ and partner programming, technical capability/expertise, commitment to local leadership, and achievements.

• **CRS Vision 2030 Goal Area**: Expand and Diversify Resource Mobilization

• **CRS Activities**: content development and maintenance, metrics capture and review, publication and promotion of technical papers, videos that show project or impact, storytelling aligned with achieving Vision 2030 goals (perhaps connected specifically to goal areas). Sharing digital content reflecting the scale and impact of funding from a specific institution. Exhibiting where CRS has partnerships and a strong presence.

• **Presumed audiences**: Priority institutional partners include individuals and leaders at CRS’ largest funding institutions which include USAID (DC and Missions), the Global Fund, USDA, UN agencies and current foundations. High priority prospects (some of these donors do partner with CRS currently, but to a lesser extent and whom we are intentionally targeting to grow our relationships): EU, World Bank, FCDO, German donors and new universities, foundations, or corporations.

• **Measurable user actions**: number of views, time on specific pages (i.e., country pages or impact stories/video pages), number of downloads of technical papers and program materials, rate of sign up related to specific content, number of enquiries to CRS experts or via another email address (representatives of institutional donors using the site to reach out or continue conversations with CRS.)

**Priority 4: Demonstrating Expertise and Commitment to Local Partnership for Non-US Local Organizations and Governments**

*Publishing CRS’ organizational development materials and Research and Publication Library to engage with potential and existing local partners and governments to cultivate relationships, grow capacity, promote our expertise, and increase awareness of CRS partnership opportunities.*

• **Outcome**: Continued development of content that reaffirms our commitment to and investment in local leadership. This content differentiates CRS from peers and competitors who voice a similar commitment to local leadership but who have not invested as heavily as we have in creating these materials over time. Increased awareness of CRS expertise to facilitate continued and new
partnerships. Increased confidence in CRS’ commitment to local leadership by seeing the depth, breadth, and quality of our materials and tools.

- **CRS Vision 2030 Goal Area**: Catalyze Humanitarian and Development Outcomes at Scale & Build a More Agile, Innovative and Impactful Organization
- **CRS Activities**: Content development and maintenance, metrics capture and review, publication and promotion of technical papers, videos that show project or impact, storytelling aligned with achieving Vision 2030 goals (perhaps connected specifically to our local leadership goals).
- **Presumed audiences**: Existing partners (such as Caritas and other Church and civil society partners and government entities) that wish to access the CRS tools and reference materials related to organizational development in the Institute for Capacity Strengthening portfolio. Potential partners with interest in our approach to partnership and how CRS can support their own organizational development. Academics and university students may also have interest in accessing these technical materials.
- **Measurable user actions**: Number of views, time on specific pages (i.e., country pages or impact stories/video pages, thought leadership materials like best practices and case studies), number of downloads of technical papers and program materials, rate of sign up related to specific content (e.g., the ICS has a regular newsletter or publication), number of enquiries to CRS experts or via another email address for opportunities to partner.

Through this RFP, CRS is seeking to engage a vendor with a deep understanding of information technology, web design and development, cybersecurity, information architecture, user experience, search engine optimization (SEO) and reporting considerations, and donor workflows to build our unified website. The vendor should be able to demonstrate successful completion of projects similar in size and scope at similarly sized fundraising and international human-development organizations. Also, they should be able to successfully facilitate the transition of ownership to the existing Digital team and resulting governance body.

In preparation for this initiative, CRS has been through a Discovery process, reviewing and documenting functional requirements from stakeholders across the agency. These requirements have been categorized and prioritized using the guiding agency redesign priorities.

Our discovery included producing the following deliverables which will be leveraged to design the new website.

- Peer organization site review
- Development of Key Personas
- Development of User Journeys
- Prioritized Functional Requirements
- Site Property Audit
- Content Performance Audit
- Content Migration Plan
- Content Strategy Plan
PROJECT WORKING GROUPS
We have also established focused working groups to ensure a collaborative and comprehensive approach to the redesign. The groups will work with the vendor, be responsible for any assigned tasks, and participate in review/approval cycles. Where possible, working groups are led by subject matter experts in each of the areas below:

- Information Architecture
- Design & Accessibility
- Technology & Integrations
- Content Strategy
- User Testing
- Hispanic Marketing, Outreach & Engagement

We also have teams focused on Content Migration, Change Management and Governance, that will work alongside this process and help us to prepare for and implement the redesign.

2. Summary of Service needs
We will look to the partner vendor to review the order of implementation for functional requirements and provide the strategic direction and implementation of all identified requirements unless excluded by future decisions. The objective of this procurement is to select the vendor who can partner with CRS to validate identified needs, communicate well-reasoned proposals on direction, and execute on that shared vision.

2.0 Current State
Though the current CRS digital ecosystem consists of over 30 separate web properties on various systems and platforms, our goal is to build an integrated solution that incorporates the following four sites: crs.org, crsespanol.org, crsricebowl.org and support.crs.org along with the functionality to allow our internal digital team to create additional branded sites or sections with additional features.

These four sites capture the breadth of needs and activities at the agency and the many ways our constituents interact with CRS through our digital properties as one or more of the following audiences:

- Donor
- Potential donor
- Planned giving donor
- Advocate
- Hispanic Catholics in the United States
- Institutional donor employee
- In-country implementing partner
- In-country donor employee
- Local government employee
- Media
Among many of these audiences, we also have identified specific attributes that we are looking to address and account for when engaging audience members including faith, affinity, and age. For each of these attributes, our audience members may exist on a spectrum in various combinations, but we consider them highly impactful for consideration.

There are over a dozen systems which support, manage, or track the customer experiences the above roles may have with CRS. The systems support the following key business processes:

- Online Fundraising
- Online Advocacy
- Email Marketing
- Digital Commerce
- Campaign Management
- Opportunity Management
- Interaction Management
- Community Management
- Customer Segmentation
- Customer Support
- Customer Data Management
- Content Management
- Digital Analytics and Feedback

The scope of this work is intended to work with an awareness of these touchpoints, but primarily focus on the content and asset management and relevant metrics as captured for those pieces.

2.1 Scope of Work
The scope of this effort will result in a new digital solution that includes positioning people, process, data, and technology to achieve CRS’ external marketing goals online by designing, developing, and launching a new centralized platform.

While the individual requirements are detailed and specific, they primarily are in service of achieving some high-level key objectives for the new platform:

- Provide a central foundational website with a parent theme that will be used to create new websites and child themes where theme, components and modules/plugins will be kept in sync across websites.
Create a centralized back-end content and asset repository deployable to different contexts and front-end patterns as the design necessitates but maintained from a single point. This includes the ability to mark content for publication across various sections or pages of the website.

Multilingual capability including support for content in English, Spanish, French, Arabic, and Portuguese with English and Spanish being the priority. Given our focus on appealing to our Hispanic audience, the vendor must have the capacity to communicate in Spanish when required by the project. This would include, but is not limited to, evaluating the Information Architecture and making recommendations for CRS Español as well as conducting end user testing and user acceptance testing in the target language. The vendor must have bilingual English-Spanish personnel able to perform information analysis, translations, communications, and tasks in the language when they are needed during the implementation of the project. Experience designing websites for the Hispanic audience in the US is highly preferred.

Design, user experience, and information architecture that reflects our goals and mental models of our multilingual, multicultural audience.

A uniform and consistent style within a site and across other sites to make it easier to understand and reduce our development cost.

The functionality to create some layout components or features that appear only on sites that will not be built initially as part of this contract. Examples may include an Annual Report, Interactive Timeline, Blog, Shopping Cart, and Glossary.

The ability to customize navigation and other components on a per page or content type basis (e.g., a landing page or independent area or section of a website).

Existing integrations with our web properties, such as Google Analytics 4 and Google Tag Manager, will still be supported, and where possible, improved. We also want to be certain the new site supports embeds for platforms such as ArcGIS ESRI maps, Power BI dashboards, and EveryAction forms.

Include our integration with SofTrek/ClearView which utilizes SofTrek’s API to create forms for accepting monthly donations from users and allows CRS employees and vendors to modify prior donor details. As well as EveryAction’s API and JavaScript callbacks which we utilize for creating custom forms that send and retrieve data to and from EveryAction, as well as customizing the functionality and display of EveryAction forms.

A flexible, resilient user interface for creating rich content will be available for content creators across levels of technical experience.

Robust permission and workflow automation capabilities.

An integrated design and pattern library to ensure consistency across the platform and with our brand.

Improved tracking to monitor the performance and ROI of digital content in content management system.

A robust, configurable search to make it easier for users to find the content they need.
• Integration of our digital asset management software (Widen).
• The platform will be compliant with the accessibility, privacy, and security standards within web expectations and regulations of 2023, including GDPR, CCPA, and WCAG 2.1 AA.
• Support best practices for search engine optimization including proper structure, metadata and schema.

2.1.2 Scope and Deliverables
The response should address the following for all four sites (crs.org, crsespanol.org, support.crs.org and crsricebowl.org):

• Outline of services and experience, and explanation of why the services would benefit CRS and meet project objectives.
• Define the methodology and applicable tools the vendor would use to develop the following project scope:
  • **Technology recommendations for future platform stack**
    o Provide a recommended technology stack and service provider(s) that can combine a wide variety of websites under one approach along with justification for recommendations. CRS will provide prioritized requirements to inform recommendations
    o Define/validate current state of business processes for Content Management System web properties
    o Validate formal business requirements and benefits
    o Benchmark high-level costs for discrete components or functionality
    o Validate project outcome objectives, and then define and implement success metrics
    o Identify how website codebase, theme and dependencies (including modules or plugins) would be kept in sync across websites
    o Consult on how multilingual content would be created, managed, identified and confirm if different language versions of content could have different layouts and utilize different components
    o Develop plan on how content can be shared across sites and how improvements and fixes can be targeted to specific sites
    o Recommend solutions that prevent issues from affecting all websites
    o Provide recommendations on domain handling
    o If your solution does not include Pantheon as a hosting provider then provide details on how WebOps will be managed (monitoring, deploying, development environments, backups, security and access management, visual regression testing)
  • **Implementation Project Plan**
    o Identify and address dependencies and sequencing
Develop roadmap with success factors, milestones, risks and mitigations, durations, dependencies, and sequencing
Propose structure of deliverables
Define timeline required for the effort
Detailed Go Live/ cutover plan
Provide standard lead time from contract signing to project kickoff

**Information Architecture and Taxonomy**
- Develop user-friendly organization of site content for optimal experience
- Create a taxonomy that aligns with agency content needs and external usability

**Design**
- Create layouts for optimal User Experience
- Create customizable templates for microsites
- Identify and create needed content types
- Generate patterns and novel elements as needed for final design

**Development and Configuration**
- Code any custom output necessary to execute design in the chosen technology
- Create Style guide for consistent application of new elements and patterns, CRS can provide references for top level patterns, fonts, and colors in current state
- Configure platform to align with agreed upon functionality, workflows, permissions, and integrations

**Launch and deployment**
- Launch of the new platform for live use by external audiences with necessary dependencies
- Identify necessary content to populate final product
- Leading functional testing, UAT, and confirmation of core assets. Conduct testing in Spanish with Hispanic audience for crsespanol.org and English for other sites.

**Training and documentation for workflows in the new platform**
- Development of training plan
- Provide documentation on workflows within the new site for content creation, editing, and configuration updates
- Sessions with CRS staff to walk through the procedures
- Backlog and change management procedures

**Define the methodology and applicable tools the vendor would use to provide project Deliverables**

**Describe your proposed interfaces with CRS, the forums and communications mechanisms you recommend for engaging CRS stakeholders and staff, and techniques for remaining on schedule and within budget. Describe the mechanisms you will use for on-going management of risks and issues.**
• Describe the services to be provided, including the cost detail for each phase of the project which could include planning, discovery, establish, design, build, testing, hosting recommendations, deployment and any preliminary maintenance/support period. For discovery, we will leverage the assets CRS has already created.
• Describe the structure and composition of your team, its members, and their roles and responsibilities, and their experience. Confirm availability of bilingual English-Spanish speaking staff.
• Describe the management approach (e.g., handling staff changes, quality control, etc.)
• Describe three similar projects (involving at least one Spanish language site) which the bidding team partner has implemented, lessons learned, and the results achieved.

2.1.3 Not in Scope
• Content creation or migration
  o Content creation and migration are expected to be handled entirely by CRS once the content types and content creation workflows have been designed, validated and the new system made available to our team.
• Asset creation for any systems besides the new platform
  o Other systems the agency uses for conducting activities in digital channels may need updates to assets or components based on the output of these designs, it is expected that CRS will be doing the necessary work to transition those assets to the other platforms according to their needs.

2.2 Timing Considerations
There are several factors that may impact any potential timeline or launch of a new platform that should be incorporated in any proposed timeline:

• **Drupal 7 EOL:** Our main site, crs.org, and several other prominent sites are currently built on Drupal 7. Drupal 7 reaches End of Life for community provided security updates on January 5th 2025, while we anticipate being able to support the sites’ security on an ad hoc basis for some months if needed, ensuring we are on a stable, secure platform is a high priority.
• **Year End Giving:** As a nonprofit that relies heavily on individual giving, we view the year end giving season, from roughly September to the end of December, as a freeze period for any significant changes or deployments that could adversely impact a user’s ability to donate.
3. Proposal Overview

3.1 Invitation to Tender Response
The intent of this RFP is to set forth the specifications, requirements, options and general terms and conditions for all services for which CRS is requesting bids and to solicit proposals from selected vendors that include proposed costs.

The issuance of this RFP and any subsequent acceptance of vendors proposals, whether in writing or orally and whether in whole or in part, does not bind or impose any legal obligation upon CRS or vendor(s) in any way, nor does it limit CRS’ right to negotiate in its best interest with any vendor at any time.

3.2 CRS RFP Manager
During this process, all vendor contact concerning this RFP shall be directed exclusively to the CRS RFP Manager using the contact information below, who will serve as CRS’ single point of contact for this process. Communication must be received at the email address below to be considered officially received. Failure to comply with these requirements may result in immediate disqualification.

Regina.hill@crs.org with CC to FY20RFPMail FY20RFPMail@crs.org

3.3 Multiple Awards
Only one bid will be awarded for this project.

3.4 Offer Deadline
The deadline for receiving proposals is October 30, 2023, at 11:59 PM EDT. Vendors shall submit their proposals electronically by email only to Regina Hill:

Regina.hill@crs.org with CC to FY20RFPMail FY20RFPMail@crs.org

Vendors are responsible for ensuring that their offers are received in accordance with the instructions stated herein. Late offers may be considered at the discretion of CRS. CRS cannot guarantee that late offers will be considered.

3.5 Electronic Submission
One (1) copy of the Vendor’s complete Proposal Response Sheet and past performance references shall be submitted via email to the RFP Manager.

3.6 Submission of Offers
Vendors must submit the proposals electronically. Zipped files and links to download proposals will not be accepted.
3.7 Chronological List of Proposal Events

The following calendar summarizes important dates in the solicitation process. Vendors must strictly follow these deadlines.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>RFP Launch</td>
<td>September 25, 2023</td>
</tr>
<tr>
<td>Vendors Questions Due to CRS</td>
<td>October 9, 2023</td>
</tr>
<tr>
<td>CRS Responses Distributed to All Vendors</td>
<td>October 16, 2023</td>
</tr>
<tr>
<td>Intent to Bid Notification Due</td>
<td>October 23, 2023</td>
</tr>
<tr>
<td>Proposals Due to CRS</td>
<td>October 30, 2023, 11:59 p.m. EDT</td>
</tr>
<tr>
<td>Vendors Selected to Proceed</td>
<td>November 13, 2023</td>
</tr>
<tr>
<td>90-minute Presentation</td>
<td>Week of November 27, 2023</td>
</tr>
<tr>
<td>SOW and Pricing Discussions</td>
<td>December 11- December 18, 2023</td>
</tr>
<tr>
<td>Final Selection Announced</td>
<td>Anticipated December 2023</td>
</tr>
<tr>
<td>Project Kickoff</td>
<td>Anticipated January 2024</td>
</tr>
</tbody>
</table>

The dates above may be modified at the sole discretion of CRS. Any changes will be published on crs.org, Bid Opportunities.

4. Proposal Requirements

4.1 Proposal Requirements

The proposal shall be limited to the following:

- Completed proposal response sheet:
  - Vendor Information
  - Rate Cards
  - Resources in Place
  - Vendor Capability Statistics
  - Rate Reduction
  - Hiring Vendor Staff
  - Staff Applicable Certifications

- Past performance references of similar work (under contracts or contracts) highlighting expertise with relevant processes, functions and modules. References must include:
  - Name and address of the organization for which the work was performance
  - Client Contact Information
    - Reference name
    - Title
    - Email
    - Phone
4.2 Proposal Response Sheet Guidelines

Vendors should be aware of the following key points regarding the Proposal Response Sheet.

- The proposal response sheet is used to determine which proposals represent the best value and serves as the basis of negotiation before award of a contract. The rate cards will represent the totality of charges that will be incurred by CRS.
- Vendors are prohibited from submitting any additional documentation beyond the Proposal Response Sheet and past performance references.

4.3 Pricing Consideration

Vendors should be aware of the following key points regarding pricing as included in this RFP:

- Vendor’s pricing response must represent the totality of charges that will be incurred by CRS (i.e., CRS will only be obligated to pay those fees and charges).
- Pricing will be a significant component of the evaluation and vendors should focus on offering competitive pricing.
- CRS has a strong desire to avoid multiple rounds of price negotiations, and Vendors that do not submit market competitive rates in its initial response risk elimination early in the evaluation process.

4.4 Rate Cards

Vendors shall provide a rate card as part of the response. Vendors shall provide rate cards with hourly rates by position and role. Rates shall be listed for “Onshore” (i.e., US citizen or resident-based resources), “Offshore” (i.e., remote non-US resources or non-US resources on short-term visa for less than 90 days), and “Landed” (non-US resources operating in US for greater than 90 days) resources. The same fixed rates shall be provided for the duration of this Project.

4.5 Validity Period

Vendors’ proposals must remain valid for 90 calendar days after the proposal deadline.

5. Evaluation and Basis for Award

5.1 Proposal Evaluation

Contracts will be executed with Vendor(s) whose proposals are determined to be responsive to this solicitation document, meets the eligibility criteria stated in this RFP and is determined to represent the best value to CRS. Best value will be decided based on a scorecard process.

5.2 Evaluation Criteria

This RFP committee will use the scorecard method totaling 100 points to determine best value. That means that each proposal will be evaluated and scored against the evaluation criteria and evaluation sub-criteria:
<table>
<thead>
<tr>
<th>Criteria area</th>
<th>Description</th>
<th>Possible score range</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technology</td>
<td>Technology in this context refers to the underlying tools used to accomplish the goals of the project including: Content Management approach, Digital Asset Management, capability to integrate with known tools at CRS, overall this will be evaluating the vendors’ comfort and familiarity with tools available and which tools they feel will be best used to further the project and how they stack up against our standards and known best practices.</td>
<td>9 to 45</td>
</tr>
<tr>
<td>Design</td>
<td>Design in this context refers to the ability of the vendor to successfully synthesize the needs of performative technology, agency branding, and goals-driven functionality into an aesthetically successful final product, particularly regarding page templates, user flows, and visual elements.</td>
<td>6 to 30</td>
</tr>
<tr>
<td>Marketing/Nonprofit/Hispanic Audience Acumen</td>
<td>This area is meant to evaluate the vendor's capacity and past experience regarding three of the most critical but disparate elements necessary towards developing the final product successfully, namely their understanding of marketing best practices, the specific needs of nonprofits, Hispanic audience outreach and the needs of NGOs and partners that NGOs collaborate with as an essential part of their work</td>
<td>7 to 35</td>
</tr>
<tr>
<td>Engagement Approach</td>
<td>How the vendor proposes to handle the project procedurally, what methods, tools, staff, and suggested cadences to collaborate successfully with CRS to project completion</td>
<td>6 to 30</td>
</tr>
<tr>
<td>Company Background</td>
<td>This area is meant to evaluate the vendor's structure and stability as an organization to support this project</td>
<td>5 to 25</td>
</tr>
</tbody>
</table>

**5.3 Negotiations**

Best offer proposals are requested. It is anticipated that a contract will be awarded solely on the basis of the original offers received. However, CRS reserves the right to request clarifications prior to award. Furthermore, CRS reserves the right to conduct a competitive range and to limit the number of Vendors in the competitive range to permit an efficient evaluation environment among the most highly rated proposals. Highest-rated Vendors, as determined by the technical evaluation committee, may be asked to submit their best prices or technical responses during a competitive range. At the sole discretion of CRS, Vendors may be requested to conduct oral presentations. If deemed an opportunity, CRS reserves the right to make separate awards per component or to make no award at all.
6. General Guidelines

6.1 CRS Code of Conduct and Business Ethics
It is the responsibility of all current and prospective Vendors to conduct their business with CRS in conformity with sound business and ethical practices and avoid any questionable conduct that could discredit any of the parties. This responsibility includes, but is not limited to, ensuring there is no collusion in the preparation of any aspect of the Vendor’s Response. CRS may eliminate or disqualify a Vendor if, in CRS’ sole discretion, it believes that a Vendor has engaged in any questionable or improper ethical behaviors or conduct. For further details please review CRS Code of Conduct and Business Ethic Documentation.

6.2 RFP Response Ownership
All Response materials submitted by vendors shall become the property of CRS and shall not be returned.

6.3 Confidentiality of RFP and Responses
This RFP and pending Agreement is subject to protection from disclosure, reproduction and use as provided in the Non-Disclosure Agreement (“NDA”) executed by Vendor and CRS. This RFP contains confidential and proprietary CRS information and has been approved for limited distribution outside of the CRS organization. Amendments, Exhibits, Attachments, supplements, questions and answers and any other related communications issued by CRS are considered part of this RFP and are confidential and proprietary and are subject to all terms and conditions of the NDA between Vendor and CRS.

In the event that a recipient of this RFP decides not to offer a Response, it should notify the RFP Manager in writing, including reasons why the Vendor is withdrawing from the RFP process. In this event, Vendor shall comply with the terms regarding the return or destruction of Confidential Material as set forth in its Non-Disclosure Agreement with CRS.

6.4 Agreement to Comply with Applicable Laws
Vendor shall comply with all applicable international, federal, state, county and local laws, orders, rules, ordinances, regulations and codes in the performance of its obligations set forth in this RFP including such obligations, if any, as an employer regarding the health, safety and compensation of its employees. Without limiting the generality of the foregoing, Vendor must comply with laws, rules, regulations and orders relating to equal employment opportunity, workers' compensation, unemployment compensation and FICA, as well as with all the Foreign Corrupt Practices Act, Export Control and related laws and regulations that may govern the provision of Services outside the US. Vendor will also be responsible for identifying and obtaining any and all required permits, certificates, approvals, authorizations and inspections required in connection with Vendor’s performance under this RFP.
6.5 Binding Period / No Contract / Severability
By submitting a Response to this RFP, Vendor agrees that its Response shall be valid for six (6) months from the date of submission. Nothing in this RFP or any communications relating to this RFP, or any existing relationship with CRS on other projects shall create an obligation on the part of CRS. CRS is under no obligation to award a contract to Vendor and Vendor shall not rely on any such possibilities. CRS may unilaterally decide to cancel, suspend and unilaterally alter any or all of this RFP and associated process with or without notice to Vendor.

6.6 Disqualification
Under no circumstances is Vendor to contact or discuss with any CRS employee, this RFP, any of the information contained herein, or this project in general. Respondents are strictly forbidden from visiting CRS locations or approaching any CRS employee, vendor or sub-contractor for any information related to this RFP or this project without the direct knowledge and authorization in writing in advance of the RFP Manager. Violation of these provisions may subject the respondent to immediate disqualification.

6.7 Costs and Expenses Associated with the Response
Vendor, by submitting a Response, agrees that any costs incurred in responding to this RFP or in support of activities associated with this RFP process, are to be borne solely by Vendor. Vendor shall be deemed to have examined all information comprising this RFP and to have obtained at its own expense any additional information, that it may consider necessary for the completion of its Response. CRS shall incur no obligation or liability whatsoever to anyone, by reason of the issuance of this RFP, or by actions of anyone thereto.

6.8 Partnering with Another Vendor
Vendors may propose one or more sub-contractor and / or teaming partners to provide a Response to this RFP, with Vendors maintaining all operational, legal, contractual and financial responsibility and liability for the actions or inactions of such parties. The previous statement notwithstanding, Vendor shall not delegate or subcontract any of its Response without CRS’ prior written approval. CRS reserves the right to reject at its sole discretion the use of any Vendor-proposed sub-contractor or teaming partner. For this reason, Vendor is to have any potential sub-contractors or teaming partner(s) approved by CRS in advance prior to entering discussions with such potential sub-contractor or teaming partner.

Under no circumstances may the RFP or any related RFP material be shared by potential Vendor with sub-contractors or other potential teaming partners. Only CRS may distribute the RFP to third parties. Vendor must indicate in its Attachment 2 (Notice of Intent to Bid) any third parties with whom it will be responding. Vendor must indicate in its Response, any and all portions of its Response that are provided by such third-party sub-contractor or teaming part.