



REQUEST FOR PROPOSAL

CALIFORNIA BUDGET & POLICY CENTER WEBSITE DESIGN & DEVELOPMENT

Name: California Budget & Policy Center

Contact: Mauricio Torres, Communications Strategist, e: mtorres@calbudgetcenter.org

1. Summary

The California Budget & Policy Center (Budget Center) is seeking an agency with proven expertise in website design and development, commitment to advancing social justice, and experience working with economic and social justice organizations to create a robust, engaging, highly effective, and accessible new web presence to replace its current website (www.calbudgetcenter.org).

The Budget Center is in the “information business.” Its primary products are:

- Briefs, fact sheets, and the occasional long-form report
- A website, commentary, and related e-blast/e-newsletter capacities
- Media advisories and press releases
- Analytical charts, tables, and the occasional infographic
- Social media activities that support, and expand the reach of, all of the above.

Additionally, we would like to expand our media products to include more videos and interactive data visualizations.

Project Goal

The Budget Center is seeking a new website that keeps our audiences and quality content at the forefront of the project. Budget Center staff will work with the selected vendor in achieving a user-friendly, visually engaging, accessible website — to be launched by January 3, 2022 — for our core audiences and visitors that:

- Directs users to the information they want and need
- Emphasizes easy navigation, search options, and multiple paths to access information
- Highlights the Budget Center’s established brand along with visuals and content representative of Californians of color and Californians with low and middle incomes
- Encourages users to engage in multiple actions — or conversions — on the site.

2. About the California Budget & Policy Center

The Budget Center engages in independent fiscal and policy analysis and public education with the goal of advancing public policies that improve the lives of Californians with low and middle incomes, particularly Californians of color who have been blocked from sharing in the state's prosperity and the opportunity to be healthy and thrive. The Budget Center is a trusted



resource for policymakers, advocates, community and philanthropic leaders, and members of the media, among others.

Our vision is for all Californians to participate fully in the state's economic, social, and political life. We believe that when California builds wealth and invests in people — especially those who have yet to share in the state's prosperity — we all benefit.

The Budget Center is a nonprofit organization. Support for the Budget Center comes from foundation grants, subscriptions, and individual contributions.

The Budget Center's primary audiences include:

- Legislators (local, state, and federal)
- Advocates
- Media
- Funders

3. Proposal Submission

All proposals should be sent to Mauricio Torres, Communications Strategist, at mtorres@calbudgetcenter.org, by April 23, 2021.

The prices quoted must be all-inclusive; anticipated additional costs should be itemized and called out in an exhibit or schedule. Any work that will not be completed by the agency with its own staff and internal resources must be specifically called out, and other partners named.

4. Contract Terms

The Budget Center will negotiate terms upon selection of the agency. The project will not commence until an agreement is signed which outlines the scope of work, budget, terms, and all necessary items.

5. Purpose and Objectives

Purpose

It has been nearly six years since the Budget Center completely redesigned its website. The Budget Center staff and website require a web professional who can code to make changes beyond routine page updates. The site architecture, design, and layout are outdated by today's web standards, and the Budget Center seeks to design a site that reflects the organization's growth and our audience's evolving user needs, including improved accessibility for people of all ages and abilities.

The Budget Center seeks innovative recommendations for a new website that will be easily accessible from mobile devices, quick to load, and easy to navigate, with the ability for

non-technical staff to easily update and maintain content using a content management system (CMS).

Objectives

- A. Serve as a well-branded, dynamic, engaging, easy-to-use resource for the Budget Center's core audiences.
- B. Integrate various types of Budget Center content — across resource types (reports, fact sheets, charts, infographics, videos, etc.) and across topic areas so that users can easily locate and access other relevant Budget Center content.
- C. Maximize the simple and compelling display of information, including text, chart/graphics, maps, and other data visualization capacities.
- D. Provide users with choices of downloading, printing, sharing, or otherwise using Budget Center resources.
- E. Allow for easy, intuitive search of the Budget Center's wide array of publications, commentary, charts, press releases, and other resources.
- F. Integrate with the Budget Center's existing platforms (social media, Salesforce, MailChimp, PayPal, Eventbrite, etc.) The website must have the ability to collect donations, email sign-ups, and event registration.
- G. Generate, based on the page/report/chart the user is currently viewing, links to recommended Budget Center content and calls to action such as email registration and donation pages.
- H. Achieve accessibility and usability for individuals with disabilities in accordance and alignment with Web Content Accessibility Guideline (WCAG) 2.1 Level AA Standards in addition to the requirements of Section 508 of the Rehabilitation Act.

6. Budget

The quote must include all planning, design, development, software acquisition, hosting, and any other elements necessary for development and maintenance of calbudgetcenter.org.

The Budget Center has allocated a range of \$65,000 - \$80,000 for this project and understands that the desired ongoing maintenance is a separate monthly cost. Existing Budget Center infrastructure, as listed in Section 5, bullet F, is not included in this range.

7. Scope

The selected web firm will be provided with core visual assets (logo, style guidelines, etc.). The Budget Center will also provide written content for the site and has access to quality stock photos through an existing subscription service. However, a successful bid will include providing consultation and content strategy as well as selecting stock visuals that effectively portray the organization's brand identity and contribute to the site's overall appeal and ease of navigation. Site development must also include selection, content migration, and set-up of a content management system (CMS) that allows the Budget Center's non-technical staff to easily

and consistently update the site after the launch. The Budget Center prefers WordPress but is open to alternative content management systems; please include any license fees for 3 years if a proprietary system is proposed.

Phase I: Development of site architecture and creative parameters. To include:

- Detailed review and confirmation of all requirements
- Creation of sitemap and wireframes
- Creation of production schedule, including Budget Center staff assignments/deadlines for content. (Note: Due to organizational priorities and workload, this project is scheduled to launch on or before January 3, 2022.)

Phase II: Design and Site Development

- Layout of design(s) for the home page and selected secondary pages (including up to two revisions of the chosen layout.)
- User testing of page design(s)/UI feedback (conducted online with a pre-selected group of the Budget Center's choosing.)
- Design, development, and populating of a fully functional website with a predetermined number of pages and including all functionality agreed to in the requirements.
- QA testing by agency of overall site and specific functionality, providing a process for final review and testing by the Budget Center.
- Content Management System fully functional.
- Migration of existing Budget Center publications, from 2017 to present.
- Implementation of SEO: Implement SEO best practices and Google Tag Manager.
- Implementation of Google Analytics and other Budget Center infrastructure as listed in Section 5, bullet F.

Phase III: Training for Budget Center Staff/Support

- Convene training sessions and provide associated documentation to enable Budget Center staff to manage site content.
- Respond to additional technical and quality testing feedback received once the website is live.

8. Requirements & Qualifications

- A. Provide 2-3 relevant examples of websites your agency has developed that are most relevant to the proposed work for the Budget Center.
- B. Briefly describe your organization's strategic communications and web design and development approach and experience.
- C. Identify the individuals who will work on the project and the roles they will play.
- D. Describe the time frame for each phase.



- E. Strong preference for US-based firms working to advance social justice and with experience working with economic and social justice organizations.
- F. Include Terms and Conditions.

9. Evaluation Criteria

Proposals must include specific costs and timelines as described previously. Electronic proposals should be emailed to Mauricio Torres, Communications Strategist, at mtorres@calbudgetcenter.org, with the subject line: Website RFP Submission. Proposals must be received by 5 p.m. PST on April 23, 2021.

Proposals which meet the minimum requirements as stated previously will be evaluated using several criteria:

- Brand – Does the agency have a clear and compelling strategy for how to address the needs of the Budget Center's key audiences?
- Aesthetics – To what extent does the agency demonstrate previous work which is clean, innovative, and on-target with respect to the brands they represent?
- Experience – Does the agency have a track record of producing quality work in a timely and cost-effective manner, similar to the work required by the Budget Center? This can be supported by references and a portfolio of similar work.
- Staffing – How long have key personnel been with the agency who would be assigned to the project? Are there ample resources to ensure successful completion of the Budget Center's website redesign?
- Forward-looking – Does the agency have a demonstrated understanding of website best practices and a finger on the pulse of "what's next?"

10. Format for Proposal

Please use no fonts smaller than 10 point. Maximum proposal length should not exceed 20 pages, not including work samples. Include contact information (name, email address, phone number, office address) on the cover/front page for the key personnel who would handle project negotiations.