

REQUEST FOR PROPOSAL:

Issued August 4, 2023

TO DESIGN AND DEVELOP A NEW WEBSITE FOR 3ETHERMAL.ORG

**RFP Submittal
Deadline:**

September 1, 2023, 4:00PM

Direct questions to:

Bre Wilkins
Operations Manager
3E Thermal
20 Gable Place
Barre, VT 05641
bre@3ethermal.org
802-477-5191

Questions Due:

August 11, 2023

Answers Provided:

August 18, 2023

Proposals Due:

September 1, 2023

Vendor Selection:

September 8, 2023

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1. BACKGROUND

3E Thermal, a program of Capstone Community Action, offers cash incentives and technical support to building owners for installing energy efficiency upgrades in qualified multi-family buildings such as apartment complexes and shelters. To qualify for 3E's low-cost weatherization services, tenants must not exceed certain income thresholds. 3E works with all owners in both the nonprofit, for profit and municipal sectors across Vermont.

3E works to serve low-income Vermonters and reduce environmental impact around the state. Most of our staff work from our headquarters in Barre, with others working remotely statewide. 3E is funded through 2 primary partnerships with Efficiency Vermont and the State of Vermont Weatherization Assistance Program. It will be critical throughout this process to work with a vendor that is able to bill 3E so they may charge different scopes of work to each funder as appropriate.

2. PROJECT OVERVIEW

3E is issuing a Request for Proposal (RFP) for services to create a new website – currently 3ethermal.org – so it is user friendly, provides information about the program and makes the application process simple for building owners and tenants. The website's

primary audience is property managers, landlords, tenants and other building professionals. The content of the website should be written in a way that is easy to digest and accurately portrays information to potential program applicants.

The selected vendor will be qualified to support 3E's website design, work within 3E/Capstone's branding guidelines, provide training to 3E staff, produce training videos and/or a training manual, incorporate fillable forms into the website, and provide ongoing technical support as needed.

The current 3E Thermal website offers the following landing pages:

- Home
- Apartment Owners
 - FAQs
- Building Professionals
 - BEAST Tool
- About Us
 - Staff
 - Partners
 - What We Do
- Financing
- Contact Us
- Apply

Any successful process will further refine this list above and create a system which is both easy and enjoyable to navigate. In addition to recreating the pages above, 3E would like to ensure the following criteria are met during the creation of the new website:

Functionality:

- a) Open-source platform such as MODX, WordPress or similar required
- b) Easy, automated back-up functionality
- c) Customized admin users with unique levels to specific sections of the site
- d) Optimization for both desktop and mobile responsiveness,

- including intuitive, effective and fast display on all devices and operating systems (IOS and Android)
- e) Browser/cross-platform compatibility for: Chrome, Internet Explorer, Firefox, Safari, iOS, Android
 - f) Capacity to allow embedding from social media platforms (YouTube, Facebook, Instagram) and any other platforms
 - g) Intuitive site search and advanced search feature
 - h) SEO enhancements and best practices
 - i) Accommodation for users with visual and hearing disabilities;
 - j) Accommodation for users who are non-native English readers and speakers
 - k) Ability to customize the web page address in order to provide search engine friendly URLs
 - l) Ability to sync site with G4 (Google Analytics 4)
 - m) A secure HTTPS site
 - n) A document management system which allows for easy organization and access to documents and images for placement in the website by department or site section

Security:

- a) The site must have secure certificates properly in place
- b) The hosting server must have latest patches, hot fixes and operating systems installed
- c) Support addressing server end issues, programming and making sure patching and hot fixes are up to date
- d) All proper security is applied and monitored
- e) Vodmruse protection applied and updated on the website
- f) Proper Domains are purchased and kept up to date

ADA Compliance:

- g) Full testing to ensure the site is usable with alternative computer technology and is ADA compliant: a. Including popular screen reader technologies (i.e., JAWS) and within numerous operating systems (Windows, Macintosh, iOS, Android)
- h) By running different web browsers under various combinations of conditions (i.e., sounds and/or images "turned on" or "turned off")

- i) Tested web browsers shall include popular graphic browsers (Chrome, Firefox, Safari, Internet Explorer and Edge)
- j) Site is usable without a mouse, on small or low-resolution screens, with only voice or text output, and with alternative keyboards; and
- k) Ensuring ADA compliance so that important information is not conveyed with color, and that foreground and background colors provide sufficient contrast; for individuals who have color-blindness, or low vision, or are working with technology or an environment where the color or lighting may be comprised

Staff Training including:

- a) Style, font, and language protocols to facilitate navigation/ consistency/ information access, and adherence to design protocol
- b) Content management practices to ensure site remains ADA compliant
- c) SEO practices when creating pages/ updating information and use and collection of analytics
- d) Best practices/style for the placement of documents and images and other links in the website
- e) Creation of a video tutorials and/or a user manual to be disseminated to 3E staff that manage the website

Content:

Migrating content from existing website and assisting in organizing new content with 3E for the website. The following should be included in the creation of the website:

- a) Adding an application page that will allow landlords and tenants to apply to the program in a secure, and private manner.
- b) Creating fillable application forms and integrating them into a landing page on the website that will alert 3E when forms have been submitted.
- c) Landing pages for the following:
 - a. Testimonials
 - b. Tenant information
 - c. Financing

- d. General FAQs
- e. Career Opportunities
- d) There may be additional content that is required to be input throughout the process
- e) Ability to work within the 3E/Capstone branding guidelines

Ownership:

The website and all products of this contract will be owned by 3E Thermal and 3E Thermal will have the ability to migrate content to and from the site at any point after completion and payment of the project if necessary.

Optional:

A yearly maintenance contract may be sought for the purpose of monthly or bi-monthly tasks such as identifying dead links, providing analytics reports to departments and annual staff training; an annual facilitation of the review of site functionality for annual development/design updates; and the provision of annual site development updates.

In addition, it is 3E's preference (but not required) to work with a vendor that can provide the following: search engine optimization support, ad writing, and Google Ads grant support.

3. VENDOR QUALIFICATIONS

The vendor team selected shall demonstrate leadership in the following areas:

- Designing websites that are enjoyable to use
- Designing websites that are easy to navigate
- Building websites that load easily and quickly
- Identifying and carrying thematic elements through a design
- Establishing content protocols and training organizations in using them successfully
- Responding creatively and uniquely to client-specific

- design/development challenges
- Seamlessly integrating third party applications

The vendor team shall demonstrate well-rounded expertise in, but not limited to, the following:

Design:

- Graphic design
- Communication style
- Site architecture for complex websites and organizations

Facilitation:

- Structure/architecture development
- Design selection
- Staff training

Development:

- Mobile site design
- Mobile site development
- Cascading Templates
- ADA compliance
- Website testing
- Third party application integration

4. VENDOR SELECTION PROCESS & TIMELINE

The selection of a vendor will include reviewing proposals submitted by September 1, 2023. The 3E team will review proposals internally and score vendors using the following metrics:

- Experience and demonstrated capabilities in web-design, development and communications
- Writing skills and abilities, including a demonstrated proficiency in conveying complex topics in clear and concise language
- Experience of the contractor in successfully completing similar projects, and ability to provide timely and in-budget results
- Experience of key personnel

- Alignment with 3E's mission
- Price and value
- Quality and completeness of the proposal
- Quality of references provided
- Ability to complete the project within 3E's proposed timeframe

3E will solicit proposals from 1-4 consultants that include team resumes, a schedule, budget, and proposed scope of work.

August 4, 2023: RFP Issued

August 11, 2023: Submit Questions by 4PM

August 18, 2023: Answers Provided by 4PM

September 1, 2023: Proposals Due

September 8, 2023: Vendor Selection

September 15, 2023: Execute Contract

December 29, 2023: Project Complete

5. BUDGET

3E has a budget of \$25,000 for a new website. We would like to complete the project with \$20,000 have \$5,000 to invest in content marketing or other strategic initiatives. However, we would like to hear your thoughts on how to spend this budget most effectively.

When billing 3E Thermal it will be essential to break out different scopes of the work as separate line items.

6. QUESTIONS

Direct questions regarding this RFP to Bre Wilkins, Operations Manager 802-477-5191 or bre@3ethermal.org

3E Thermal will maintain a list of questions and answers regarding the RFP and will supply a link to them upon the close of questioning.

Questions will be accepted until close of business on August 11, 2023 to ensure all parties have adequate time to review the answers.

7. SUBMISSION OF RFP

Proposals may be emailed, mailed or otherwise delivered to 3E Thermal. All submissions must be delivered by 4:00PM, September 1, 2023 to:

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