



## REQUEST FOR QUOTATIONS (RFQ)

**Title: CFAN website redesign**

### SUMMARY OF PROCUREMENT

We are looking for an agency to help us redesign and relaunch the CFAN website.

The agency would work with CFAN's marketing lead and project team (see Primary Contacts) to reach the goal of an accessible, maintainable, and user-friendly website that stands out from our peers, meets our users' goals, and meets our business goals.

#### **About RMI**

RMI decarbonizes energy systems through rapid, market-based change in the world's most critical geographies to align with a 1.5°C future and address the climate crisis. We work with businesses, policymakers, communities, and other organizations to identify and scale energy system interventions that will cut greenhouse gas emissions at least 50% by 2030.

For nearly 40 years, RMI has utilized our unique techno-economic expertise and whole-systems thinking to both publish groundbreaking research and analysis. We bring together collaborations of rare reach, range, and expertise—creating unconventional partnerships and mobilizing action to drive change on the massive scale needed to combat the climate crisis.

#### **About RMI's Climate Finance Access Network (CFAN)**

CFAN is a global network that supports developing countries in securing and structuring finance for climate investments via a community of highly trained, embedded climate finance advisors. CFAN is hosted by RMI, a "think-and-do" tank with a mission to accelerate the world's transition to clean energy. While we are hosted and staffed by RMI, we maintain our own website, [cfanadvisors.org](http://cfanadvisors.org), which represents the CFAN mission, shares advisor profiles and stories, and shares our work with international funders, partners, and policymakers in government, industry, and the non-profit space.

#### **About [cfanadvisors.org](http://cfanadvisors.org)**

The current site is a custom WordPress theme developed in 2020 as a detailed landing page. It has since been adapted to house an interactive map that links to individual country profiles.

The main "conversion" user stories are: (1) reaching out through the contact form, (2) downloading content, (3) signing up for updates, and (4) engaging with our blogs, content, and linked social.

### SCOPE OF WORK AND OUTPUT/DELIVERABLES

#### **Project and Business Goals**

- Illustrate CFAN impact for donors and partners
- Feature advisors



- Capture CFAN mission and approach
- Invite engagement
- Showcase partnerships
- Serve as a resource for climate finance professionals

**Audience and User Goals**

| <b>Audience</b>   | <b>Problem they need to solve</b>  | <b>How we solve it</b>   |
|-------------------|--|--|
| Country reps      | A time-limited cycle in which to accomplish things<br>Pressure from constituents/higher ups/peers<br>Need to show strongly backed stance and action<br>Account for political/regional volatility | CFAN is a neutral broker able to platform country voices, provide trusted support and access to a global network, and offers tailored support for achieving climate goals and closing on finance opportunities via training, workshops, and embedded advisory support  |
| Funders           | Need to fund high-impact, implementable, scalable efforts<br>Made anxious by volatility, lack of infrastructure<br>Need for demonstrable evidence of impact                                      | Demand-driven action: direct response to country needs by providing direct and immediate interventions in the form of advisors and training<br>Non-duplicative: brings together a network of organizations active in the space to ensure that efforts are additive and complementary<br>Lasting impact: impact will last due to ongoing in-country trainings by and for the advisors |
| Change-makers     | Lack the capacity and time to create/seek out technical analysis<br>Marching orders from political higher ups<br>Need to create a compelling case with rigor and expertise                       | Neutral broker<br>Technical expert that allows board members and reps to go to their higher ups with technically informed recommendations<br>Platform for country voices<br>Behind the scenes but ever-present   |
| Potential members | Short timelines, delivery concerns, Operation within a broken/bureaucratic system<br>Reporting and budget constraints<br>Fundraising   | Fundraising support<br>Access funding for advisors, elevate expertise/presence in a region<br>Enhancing coordination, reducing replication, backstopping, opportunity exploration, receiving CFAN training   |



|                    |  |  |
|--------------------|--|--|
| Potential advisors | Salary, professional reputation, institutional support, professional development opportunities, networking | Access to state-of-the-art, fully funded training<br>Ongoing backstopping support and technical assistance<br>Network of peers, member initiatives, and donor institutions |
|--------------------|--|--|

### Deliverables

- A sitemap and information architecture for the new website
- Documented design files for reusable components
- Template and page level mockups that cover all key pages in the agreed sitemap
- Prototypes (via design tools like Figma or InVision, or via code) to demonstrate and align on the user stories and functionality
- Production-quality custom theme and plugin code implemented on cfanadvisors.org and managed in a GitHub repository
- A content management system with a suitable level of reusable templates and components to build and maintain future content
- Migration and addition of new content into the website for an initial launch
- Documentation and training such that our internal team can effectively maintain the website

### Requirements

- Performant to a standard we will collaboratively define (e.g., high Google Page Speed / Lighthouse scores). The
- Accessible (WCAG 2.0 AA standards)
- Optimized for search engines, in terms of *technical* SEO, in any low-hanging fruit ways not already covered by code quality, performance, and accessibility efforts
- Responsive to a wide range of screen sizes
- Compatible with all major browsers (does not need to support Internet Explorer) and uses reasonable fallbacks or poly-fills for any feature or spec not fully supported by all browsers
- CMS coverage for any frequent (daily or weekly) edits to content.
- Fast, powerful search and facet-based filtering of our resource library



## Scope

- Homepage
- Resources page with pagination, filtering, sorting, and search
  - External links to reports, sites, videos (we have a Vimeo account for anything that needs embedding)
  - Blog function
- Contact page
- Partners page
- About CFAN page
  - Mission and initiative details
  - Governance
  - Team (bios, headshots – links to RMI bios [pages](#))
- Country + Region pages
  - Project pipelines
  - Advisor profiles
- Training page
  - Prospectus
  - Link to online learning platform for advisors only (Moodle)
- Member page
  - Criteria
  - Network
  - Descriptions
- Advisor page
  - Criteria
  - Hiring
  - Placement
- Quotes component
- Join Us page, with web forms
- Additional pages and templates as identified and agreed upon during the discovery phase and documented in the sitemap
- Finding/processing suitable images—given CFAN art direction—on RMI’s iStock account.

## Out of Scope

- Core Visual Branding. RMI/CFAN will use the existing CFAN logo and core brand colors. However, we are open to new typography and additional, secondary color palettes for the website.
- Copy. CFAN will provide all final copy, keeping within collaboratively defined parameters to accommodate agreed upon designs.



- Certain image files and assets such as any original photography the site needs: CFAN will provide all partner logo files and staff/partner headshots.
- PDF files or other downloads.
- Hosting. RMI/CFAN will provide a WPEngine hosting environment, with production, staging, and development environments.
- GitHub. RMI/CFAN will provide.
- Licenses for any approved, paid plugins, software, or services material to the cfanadvisors.org website. RMI/CFAN will provide licenses or logins.

**Duration**

This is a limited term contract ending with the completion and delivery of the CFAN website. We are targeting public launch in September 2022, with the possibility for add-on development after the launch.

We will be starting major outreach around or new regional cohort in the Caribbean in the fall during the lead up to the COP27 Climate Conference in November. We will be doing significant outreach around New York Climate Week (Sept 19-25) and so hope to have a redesigned site ahead of this date. Ideally, we would be able to see a near-finished product in late August and have all kinks worked out by September 15. Since we recognize the time constraints, we are open to the idea of iterative updates, where we prioritize the must-haves for September and build future components on a rolling basis.

**GUIDELINES FOR QUOTATION SUBMISSION**

**Requirements**

| <i>For RMI Procurement Lead to fill in:</i> |  |             |                          | <i>For Tenderer to fill in:</i> |                    |                                |
|---|--|-------------|--------------------------|---------------------------------|--------------------|--------------------------------|
| <i>Line-item no.</i>                        | <i>Description of Goods / Services</i>                                       | <i>Unit</i> | <i>Quantity required</i> | <i>Unit Price</i>               | <i>Total Price</i> | <i>Estimated delivery date</i> |
| 1   | <i>Sitemap + Wireframes</i>  | <i>Set</i>  | <i>1</i>                 | \$                              | \$                 |                                |
| 2   | <i>Component, template, and page mockups and design files</i>                | <i>Set</i>  | <i>1</i>                 | \$                              | \$                 |                                |
| 3   | <i>Custom theme—and plugin if needed—code implemented on production site</i> | <i>Set</i>  | <i>1</i>                 | \$                              | \$                 |                                |
| 4   | <i>Content migration/population</i>  | <i>Set</i>  | <i>1</i>                 | \$                              | \$                 |                                |
| 5   | <i>CMS + Code Documentation + training</i>                                   | <i>Set</i>  | <i>1</i>                 |                                 |                    |                                |
| <b>Subtotal</b>                             |  |             |                          |                                 | \$                 |                                |
| <b>Sales tax (if applicable)</b>            |  |             |                          |                                 | \$                 |                                |



|  |           |
|--|-----------|
| <b>Delivery charge (if applicable)</b> | <b>\$</b> |
| <b>Other charges (if applicable)</b>   | <b>\$</b> |
| <b>TOTAL</b>                           | <b>\$</b> |

Each tenderer must fill in the grayed sections in the table above.

The selected tenderer will also be able to demonstrate capacity in similar work or delivery of goods, particularly:

- *Information Architecture and UX*
- *Visual design*
- *UI design*
- *WordPress theme/plugin development, including Advanced Custom Fields, custom Gutenberg Block development, and the WordPress “site editor”*
- *PHP, JavaScript, CSS, and Semantic HTML*
- *Git + GitHub*
- *Technical SEO*
- *Clean, performant, accessible code*
- *Digital project and product management*

### **Quotation Content**

Tenderers should submit:

- *A statement of interest that includes a description of how the above Requirements are met*
- *Tenderer’s official name, address, and contact information*
- *Name, position, address, and contact information of person who is authorized to make decisions or represent the tenderer*
- *Type of entity*
- *A CV or CVs of core team*
- *Examples of and references for similar work*
- *Tenderer contact details*
- *Quotation validity period*

Quotations, including all supporting documents, should be written in English and financial information should be provided in USD. Supporting documents may be in another language, provided they are accompanied by an accurate translation of the relevant passages in English.

RMI is aware that information contained in a quotation may indicate a tenderer’s current operations and may be confidential. Therefore, RMI requests that any confidential information in a quotation be clearly identified as such and RMI will treat it as confidential.



All materials submitted with a quotation become property of RMI. RMI will have the right to use all ideas or adaptations of the ideas contained in the quotations received subject to clearly identified confidential or proprietary limitations. Disqualification of any quotation does not restrict or eliminate this right.

### RFQ Process & Timeline

| Stage of Procurement                               | Date, Time, Time zone |
|--|-----------------------|
| RFQ released                                       | May 16, 2022 6am MT   |
| Deadline for questions                             | June 8, 2022          |
| Questions answered by RMI                          | June 13, 2022         |
| Quotation submission deadline                      | June 17, 2022 6pm MT  |
| Interviews with selected tenderers (if applicable) |                       |
| Final tenderer selection                           | June 25, 2022         |

All questions about this RFQ must be received via electronic mail to the contact below. Answers to the questions will be shared with all parties who have asked questions or otherwise expressed interest.

All quotations must be sent via electronic mail to the same contact listed below by **June 17, 2022 6pm MT**:

*Denali Hussin, Program Marketing Lead, dhussin@rmi.org*

*Dan Slanger, RMI Web Manager, dslanger@rmi.org*

When sending questions or submitting a quotation please use this electronic mail subject: *Quote for CFAN website*

Please note that it is the tenderer's responsibility to ensure that the quotation and all other required documents are received by the closing date at the email address specified above. Quotations received after the time and date specified will not be reviewed or considered. Failure to provide any information requested in this RFQ may result in rejection for non-responsiveness.

### EVALUATION AND SELECTION

#### Evaluation Criteria

The following elements will be the primary considerations in evaluating quotations submitted in response to this RFQ.

Formal criteria:

- *Experience with similar projects*
- *The extent to which the quotation fulfills RMI's stated requirements as set out in the RFQ*
- *Completion of all requirements*

Financial quotation criteria:



- *Price/fees; the cost of operating, maintaining, and repairing Goods or cost of construction*
- *Terms of payment and guarantees in respect to the subject matter*

*The tenderer offering the best overall value will be selected. For this procurement, price is considered more important than non-price aspects.*

### **Selection Process**

No quotation development costs shall be charged to RMI. All expenses are to be borne by the tenderers. RMI may award to the tenderer offering best value without discussions. However, RMI reserves the right to seek tenderer clarifications and to negotiate with those tenderers deemed to be within a competitive range.

RMI may, at its discretion and without explanation to the prospective tenderers, choose to discontinue this RFQ without obligation to such prospective tenderers or make multiple awards under this RFQ. Procurement contracts will not be awarded to tenderers debarred by the U.S. government or named on restricted parties lists. Any quotation may be rejected in whole or in part for good cause when in the best interests of RMI.

A quotation will be selected based on the evaluation of the RFQ response, the interview results, any necessary vetting and due diligence, and the satisfactory outcome of financial negotiations. After the selected tenderer and RMI have entered into a contract for goods/services, RMI will notify the unsuccessful tenderers.

Any Tenderer who wishes to ascertain the grounds on which its quotation was not selected, should request explanation. The RMI procurement contact shall promptly provide in writing an explanation of why such quotation was not selected. Please note, if a tenderer requests a debriefing meeting, the Tenderer shall bear all their costs of attending such a debriefing meeting and the hourly rates of the RMI staff required for the meeting if significant expenses are incurred by RMI.