

# Request for Proposal: Website Redesign and Drupal Migration



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## About Us

Freedom House (FH) is 77-year-old non-partisan, non-profit organization dedicated to championing democracy worldwide. We research and analyze the challenges to democracy; advocate for greater political rights and civil liberties; and support frontline activists to defend civil society and promote democratic change. Freedom House is headquartered in Washington, DC, with a research and analysis department in New York and several field teams throughout the world.

## Project Overview

We seek a web development firm to partner with us in redesigning and rebuilding our 6+ years old website. Besides our code becoming unstable and end-of-life, Freedom House's advocacy and research activities are increasing and evolving. Our website is no longer consistent with our organizational vision and communications strategy.

Our goal is to create a compelling, efficient, highly-targeted user experience that better integrates our wealth of research content and analysis. Key audiences for our website include: government officials, civil society and non-government organization leaders, the media, private sector leaders, educational institutions, and donors.

## Project Scope

We envision the website project as a two-step process: 1) the vendor facilitating a **discovery phase** to compile a prioritized backlog of features and functionality (including rough LOE estimates), followed by 2) an Agile website **build phase**. Freedom House will provide a Project Manager (main point of contact for vendor and project management for Freedom House work), Product Owner (lead for strategic/business decisions), SMEs, and content QA. The vendor will provide all other necessary services and roles to successfully execute this project.

Specifically, we hope to accomplish the following:

- Upgrade from Drupal 7 to Drupal 8 or 9 (whichever version is most logical, depending on integrations, technical dependencies, and version release dates).
- Organize and present our information in a visually compelling way that best serves our key audiences, rather than reflecting our internal organizational structure.
- Integrate and allow comparison of our data across geography, time, and themes to create content that is more insightful and relevant for our audiences. (Freedom House annually analyzes complex data that covers 209 nations and territories, and we currently share this data on our sites as several siloed publications.)
- Build more interactive, "self-serve" features, such as allowing users to create their own filters and save/download information.
- Maximize save and share-ability of our information across multiple tools and social media platforms.

The vendor must provide both strategic assistance and tactical services in the scope, design, build, staff training, and launch of the new Freedom House website.

This work is likely to include:

- Strategic analysis and redesign of back-end and front-end system architecture
- Development of a website content strategy and implementation plan, based on meeting goals of our Key Audiences and including UX and IA
- Designing and implementing a site-wide visual redesign, which could include refreshing and unifying themes, fonts, color, layout, and branding
- Planning for and holistic integration with our research & analysis database (in trial development using Airtable), Salesforce and related software (e.g., Pardot, Click & Pledge), and/or other SaaS tools we use
- Designing and implementing a website content migration plan (*note: we expect to both curate/cull our existing content and create new content*)
- Designing and implementing CMS editorial workflows for content and data managers

## Project Requirements

### A. Required Technical Specs at Launch

1. Final architecture, CMS, and website are easy for Freedom House staff to use, monitor, and maintain
  - a. CMS must be Drupal 8 or 9 (whichever version is most logical, depending on integrations, technical dependencies, and version release dates)
  - b. Website must use the most recent version of PHP that is compatible with chosen Drupal version
2. An appropriately scaled and reasonably priced third party hosting solution for the website has been implemented, including monitoring and support services (*Note: we are open to improvements/other tools.*)
3. Website is fully functional, speedy (full page load time of 2 seconds or less), and responsive (RWD) for the following browsers:
  - a. 3 newest major versions of Chrome/Chromium
  - b. 3 newest major versions of Firefox
  - c. 3 newest major versions of Edge
  - d. 2 newest major versions of Safari
  - e. newest major version of Opera
  - f. IE11+
4. Google Analytics, Facebook Pixel, and other metrics/analytics code (as needed) have been implemented
5. Third party event, donation, and registration/subscription management tools have been integrated and align with the Freedom House brand and website styles. We use

Salesforce, Pardot, and Click and Pledge to handle event registration, newsletter sign-ups, and donations. The user experience should be seamless when transitioning between FH.org and third party integrations.

6. Multiple language support has been implemented at a basic level. Specifically, for all content on our site, we need support of characters and diacritics in the following languages in addition to English: Amharic, Arabic, Armenian, Azeri, Belarusian, Chinese (both Simple and Traditional character sets) Farsi, French, Georgian, Kazakh, Kyrgyz, Portuguese, Russian, Serbian-Croat, Spanish, Turkish Ukrainian, Urdu, and Uzbek.

### **B. Security at Launch**

1. Website and CSM must be security-oriented and meet or exceed industry security best practices at time of launch (e.g., SSL, HTTPS, Drupal security modules, etc.). Freedom House is a target, and organizations similar to ours have been hacked recently.
2. Two-Factor Authentication must be enabled for all CMS users and for administration on all versions of our site (e.g., development, staging, production, failover).
3. Website must integrate with a CDN (currently Cloudflare) and APM tools (currently New Relic). *Note: we are open to improvements/other tools.*

### **C. CMS Editorial & User Management at Launch**

1. Ability for website editors and administrators to easily search for, draft, edit, preview/QA, schedule, publish to and update content/issue corrections on the website via an editorial workflow (rather than a code deployment)
2. Ability for website editors and administrators to easily search, navigate, and restore previous versions of our content. Tracking should include users, timestamps, and diffs/indications of what changed.
3. Ability for website editors and administrators to easily (and preferably automatically) pull and render specific data and content from linked databases and/or SaaS systems (e.g., country scores, comparative score charts, DAMs, etc.)
4. Ability for CMS administrators to:
  - a. manage end user accounts (e.g., reset password, deactivate/delete user)
  - b. manage a subset of staff accounts and permissions on the CMS via integration with Freedom House's SSO solution (not all staff will have access to the CMS)

### **D. Sample Core Content and Features/Functionality**

*The below is not an exhaustive, final, or prioritized backlog; it's a rough draft of what we believe we might design and build and will be refined during the Discovery phase.*

1. **Homepage:** likely structured for users who do not know Freedom House and trying to learn about who we are/what we do, but may also include (potential) donors and target audiences looking for a specific piece of information (e.g., just-launched annual reports)
2. **About Us:** history, mission, bio pages for Board of Trustees and staff/experts/Fellows, careers, what we do/our work (e.g., Research & Analysis, International Programs, Advocacy)

3. **Countries (new):** 209 individual pages for each country and territory we cover, aggregating on each all Freedom House data & analysis on that country with the goals of making it easier for users to find the information they need and for Freedom House to highlight the most important information to know about that country. Contains current year and archival quantitative and qualitative data from major reports (*Freedom in the World*, *Freedom on the Net*, *Nations in Transit*, *Freedom of the Press*) and relevant information from blog posts, press releases, articles, advocacy initiatives, FH experts, and FH program information. Also contains auto-generated and/or interactive data visualizations.
4. **Regions (new):** index of countries within a geographic region. May also include for each region special reports, trends, rolled-up data/analysis, and topics/issues to watch.
5. **Explore Our Data (new):** allows users to filter Freedom House scores by 8-12 multi-select values. We will also provide a small number of pre-set filters that contain data we think is most insightful in explaining trends or issues.
6. **Reports:** Most recent flagship annual reports, special reports, topical essays and analysis, and briefs
7. **Programs:** descriptions of our programmatic work and links to content of particular interest to program funders
8. **Advocacy (new):** policy recommendations, successes, materials, joint letters, public statements, activist resources (tools, best practices, etc.)
9. **Current Analysis:** blog, newsletters, OpEds, speeches, etc.
10. **Recommendations & Related Content:** Effective, accurate related/recent content recommendations functionality has been implemented. Currently, certain areas of our site contain related/recent content recommendations based on our taxonomy and manual curation with tools like Solr and Drupal Views. *Note: we are open to improvements/other tools/other methods to make this functionality more useful and compelling for our end users.*
11. **Save & Share (new):** features and functionality have been integrated. End users can easily download, export, email, text, and share our content (URLs, infographics, images, pull quotes, and more) across social platforms (Twitter, Facebook).
12. **Search:** effective, accurate website search (including Boolean). Currently, we use ElasticSearch and a custom module. *Note: we are open to improvements/other tools.*
13. **Donate:** information for donors, ways to support Freedom House (sponsorships, planned giving, sponsorships, endowments, etc.), donor recognitions, integration with Click & Pledge for online donation management
14. **Events:** descriptions of upcoming events, integration with Pardot and Click & Pledge for RSVP management, links to past event video/material for past year
15. **Subscribe:** integration with Pardot to manage our newsletters, email lists
16. **User Accounts (new):** users can create and manage newsletter and list subscriptions, event RSVPs, and change their password and email address. We may also use accounts to test and manage paid site features/functionality (e.g., saving favorite filters, creating custom dashboards) and to learn more about our users. *Note: we do not (and will not) have commenting or online community functionality.*

17. **Archive & Reference (new)**: full annual reports from previous years, explanations of our methodology and taxonomy, FAQ, and other resources for researchers
18. **Press/Media Center (some new features)**: media inquiry management, experts and speakers bureau, press releases (past 12 months), social media feeds, official statements, other content/tools to help journalists reach Freedom House experts quickly and understand our work in general

## Vendor Requirements

### Minimum

- Proven knowledge of and ability to design, code, test, and implement websites, including all aspects of project management and the entire project lifecycle (scoping to handoff/closeout and training).
- Expert knowledge of Drupal, specifically version 7 and experience with migrations/upgrades to newer Drupal versions
- Proven ability to construct effective, efficient, user-friendly website interfaces (UI/UX)
- Proven knowledge of basic data visualization forms, methods and best practices, and experience with design or coding tools/libraries (e.g., Adobe Creative Suite, Chart.js, Tableau)
- Proven ability to provide web hosting recommendations based on client needs, execute set-up and deployment of websites, and provide documentation for long-term maintenance and support by client staff
- Proven ability to build websites that meet or exceed the industry's current security best practices

### Desired

- Experience working with nonprofit organizations and/or NGOs
- Experience working on websites targeting key audiences (rather than “general public”)

## Selection Process & Timeline

### Process

- Participation is open to all qualified firms. The original website developer vendor is no longer supporting our site. That firm may choose to participate in this solicitation; however, *all solicitations will be evaluated fairly and equally, with no preference for the past vendor.*
- In order to assure a fair process for all participants, all communication must be by email only.
- This request for information is the first step in Freedom House's vendor selection process. One or more respondents to this RFP may be asked to scope and prepare a more detailed proposal.

### Proposals must include:

- Firm name & contact information (up to 2 people)
- Short narrative describing the history (including year founded) of the firm and its relevant expertise
- Explanation of how the firm would engage with Freedom House, including proposed timeline, scope, and budget
- Examples of similar work, which could include screenshots/images and URLs.
- Cost and resource estimates: type of proposed contract (e.g., fixed fee, T&M) and the resources/number of each needed for this project, whether they are in-house or subcontracted, rates, estimated hours needed, and any non-personnel costs
- Estimated start date (How quickly could an engagement begin following selection?)
- References: project summaries and URLs/visuals for three (3) similar client projects within the last two years, including a contact for each

### **Selection Criteria**

Factors will include (but may not be limited to):

- experience and competence
- vision (both short and long term)
- cost
- project scope and schedule

### **Timeline**

- Firms are encouraged to submit written questions about this solicitation to [RFP@freedomhouse.org](mailto:RFP@freedomhouse.org) by **March 15, 2019**. By March 22, 2019 Freedom House will answer all questions in a single document, which will be shared with all firms in order to ensure parity and consistency.
- Please email proposals to [RFP@freedomhouse.org](mailto:RFP@freedomhouse.org) by **11:59PM (Eastern) on March 29, 2019**. Proposals must be submitted as a PDF and not exceed ten (10) 8.5" x 11" pages in length.
- Freedom House will identify finalists by April 12, 2019. Finalists will be expected to conduct presentations during the week beginning April 15, 2019.
- Freedom House will select a firm by May 1, 2019.
- The selected firm should plan to start this engagement in June 2019, with the goal of launching a new site by September 30, 2019 in order to support the anticipated release date of our next major report. *NOTE: we are open to a phased or MVP rollout of the redesigned site.*