

# **Request for Proposal (RFP)**

## **For Website Creation, Ongoing Maintenance, Analytics Tracking, and Integration with the Current Digital Landscape**

### **1. Introduction & Background**

#### **Overview of the Organization:**

The **World Heart Federation (WHF)** represents the global cardiovascular community, uniting more than 200 patient, scientific and civil society groups, and foundations. Together with its Members, WHF influences policies, shares knowledge, and inspires behaviour change to achieve heart health for everyone. WHF works to ensure that every person has access to the information, care, and treatment they need to maintain a healthy heart, regardless of their race, nationality, gender, age, education, or income level. WHF advocates for heart health and works to reduce the global burden of cardiovascular disease and stroke, which claim over 20.5 million lives each year.

WHF is an active hub promoting heart health and driving change at local, regional, and global levels. WHF brings together a diverse network of multi-sectoral actors to help people live longer, healthier lives.

#### **Project Purpose:**

The purpose of this project is to redesign the World Heart Federation's website to better support our mission, vision, and strategic goals. The new website will:

- Raise awareness of cardiovascular disease and prevention.
- Improve user experience for a broad audience, including the general public, members, donors, and policymakers.

- Facilitate advocacy efforts and help drive global change.
- Support our 200+ member organizations by providing a platform for sharing knowledge, resources, and updates.
- Ensure seamless integration with our CRM system for better data management and personalized communication.

In addition to the redesign, the project will involve ongoing maintenance, integration with our current digital tools and platforms, and advanced analytics tracking to better understand user engagement and site performance.

### **Current Digital Landscape Overview:**

Our current website is built on **WordPress**, and our CRM system is hosted on **CiviCRM**. The CRM is integrated with the website via APIs, but the current integration is limited, with some data synced only once per day. The CRM handles email marketing, user profiles, and donation management, but the system lacks advanced segmentation and personalization capabilities. We also use basic tools like **Google Analytics**, **Hotjar**, and **Dynomapper** to track website performance, along with **SEMrush** for SEO.

We aim to enhance the integration between the website and the CRM, improve digital marketing capabilities, and ensure regular, detailed reporting of digital performance metrics across all platforms.

The new website should cater to a broad audience, including the general public seeking information about cardiovascular diseases, policymakers, and our 200-member organizations. Additionally, we want the website to support content sharing on social media and provide enhanced SEO capabilities for multiple languages.

Current issues we would like to improve:

- One all-inclusive site instead of multi-site installation
- Strong search capabilities
- Intuitive navigation
- Print of the content in eye-catching layout

- Content restructuring
- Develop and implement strategies to increase user engagement, reduce bounce rates, and improve overall site performance metrics
- Incorporate robust multilingual support and enhance search functionality across all sections to cater to a global audience effectively.
- We would like to have cross-departmental collaboration with centralized oversight.
- Avoid content-silos (Create a topic-based content structure spanning across departments and silos, unifying user experience and encouraging deeper engagement.)
- Primarily used for raising awareness, advocacy, promoting events, and engaging donors and partners, but lacks advanced features for user engagement.
- Content Discovery (Implement related content suggestions on each page to keep users engaged and reduce bounce rates.)
- Simplify navigation

Shortlisted vendors will be invited to discuss the current functionality, performance, and challenges facing the WHF's existing digital infrastructure to inform the development of the new strategy.

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## 2. Project Scope

### Website Creation/Redesign:

- **Design and UX/UI Requirements:** The new website must be responsive, user-friendly, and meet accessibility standards (WCAG). The design should cater to our primary audience of the general public, members, and donors. It must reflect our brand identity while providing an intuitive user experience, ensuring that the user can easily navigate between the scientific aspects of cardiovascular diseases, advocacy efforts, and awareness campaigns. Clear navigation and best practices in UX/UI design are essential to avoid confusion and enhance the user journey. The UX strategy will prioritize tailored experiences for different

stakeholders, including members, partners, the general public, and policymakers, ensuring the website addresses their unique needs and expectations.

- **Content Management System (CMS):** We currently use WordPress and are satisfied with its performance, but we are open to suggestions. The CMS should be scalable, allowing for easy content management with minimal technical expertise while supporting future growth. Seamless integration with our CRM (CiviCRM) and any future third-party tools is a priority.
- **SEO Optimization:** The site must be optimized for search engines, ensuring high performance in organic search rankings. This includes optimizing for on-page SEO, improving load speed, and ensuring mobile optimization. We require tracking for Google Analytics data such as page visits, unique users, bounce rate, and events, along with social media engagement tracking for platforms like Facebook, Instagram, LinkedIn, and Twitter.
- **Mobile Optimization:** The new website should follow a mobile-first design approach. It must be fully responsive and provide a seamless experience across devices, including mobile, tablet, and desktop. Both desktop and mobile versions should be optimized for speed and user experience.
- **Content Strategy:** We will provide branding guidelines, including color schemes and logos. We require assistance in structuring content (copywriting, visuals, etc.), and we are open to agency suggestions on media development. While we already have an information architecture strategy, we are flexible and willing to adopt best practices recommended by the agency. We currently have 1500 pages on the website, but this might change with the new information architecture.
- **ChatBot integration** – We are using DruidAI Chat Bot solution and would like to make sure that the content of the website pages are structures so they can be easily read and used in the training of the ChatBot.

## Ongoing Maintenance:

- **Support and Updates:** The agency will provide ongoing support for technical issues, regular software updates (CMS core, databases, PHP version), and bug fixes. This includes troubleshooting specific web pages, adding new features, and ensuring the hosting environment is secure and efficient. Hosting will be managed on a Swiss server (Infomaniak), and while the agency will have full control, we require access as well.
- **Training and Documentation:** Provide training for four staff members (two from each department) on managing the website using the CMS. The agency should provide comprehensive documentation on maintaining and updating the website, ensuring our team can manage content effectively.
- **Hosting:** Recommend hosting solutions or propose hosting management strategies to meet our needs for performance, security, scalability, and GDPR compliance. The agency will be responsible for maintaining SSL certification.

### **Analytics Tracking:**

- **Analytics Integration:** The website should integrate with Google Analytics and Hotjar. We require tracking of user behavior, conversion rates, donations, event registrations, engagement metrics, and page load times. The website should include tracking for Meta ads, LinkedIn, and Twitter, ensuring that all user interactions are recorded and analyzed.
- **Tracking Requirements:** We require tracking of key performance indicators such as user behavior, donations, email sign-ups, event participation, and overall engagement with content. The agency should propose solutions for automating this process and creating dashboards that provide actionable insights.
- **Reporting and Insights:** The agency will provide real-time reporting capabilities and schedule performance reviews every three months, delivering insights into website traffic, user engagement, and conversion rates. These insights should inform ongoing SEO and content optimization strategies.

### **Integration with Current Digital Landscape:**

- **CRM Integration:** The website must integrate with our current CRM system (CiviCRM), ensuring seamless management of member and donor data. The synchronization between the CRM and website is currently handled through APIs, and we would like to explore real-time synchronization options, though we are flexible based on technical recommendations.
- **Email Marketing Tools Integration:** The website must integrate with our email marketing platform, currently managed via CiviCRM, to facilitate personalized communication and digital marketing. We are open to any additional recommendations for improving segmentation and personalization in our communications strategy.
- **Social Media Integration:** Enable easy sharing of content on social media platforms, including Facebook, Instagram, LinkedIn, Twitter, YouTube, TikTok, and WhatsApp. The website should track social media engagement and allow for the integration of social media feeds.
- **Third-Party Tools:** The website will need to integrate with additional tools such as donation platforms and payment gateways. While donations are currently managed through the CRM, we are open to the website handling this process if it can integrate seamlessly with the CRM for real-time data synchronization.
- **DRUID AI** based Chat Bot that we are using currently needs structured content of the web pages that can use for training, so the new website should cater that .

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### 3. Technical Requirements

#### Technology Stack:

The new website should be built using modern and widely supported technologies to ensure scalability, security, and ease of integration. We currently use WordPress, which has served us well, and we are open to continuing with it, but we are also flexible to consider suggestions for more

optimal solutions that offer greater integration with our CRM system. The preferred technology stack should include:

- **Frontend Technologies:** HTML5, CSS3, JavaScript (with frameworks such as React or Vue.js for dynamic content).
- **Backend Technologies:** PHP (for compatibility with WordPress or other CMS solutions). We are also open to other suggestions like Python (Django) or Node.js if justified for the project scope.
- **Database:** MySQL or another scalable database solution.
- **CMS:** WordPress is our current CMS, and we are open to continuing with it, but greater CRM integration will be crucial.
- **API Integration:** to be proposed by the agency for integration with the CRM and other third-party platforms.
- **SEO Tools:** Use technologies that support SEO optimization, such as AMP (Accelerated Mobile Pages) where appropriate.

If you recommend different technologies, please provide a clear justification for their use, highlighting their advantages over the current setup and how they will enhance integration, performance, and scalability.

### **Security Requirements:**

Security is of the utmost importance, especially as we handle sensitive information related to donations and user profiles. The website must:

- Be secured with **SSL certificates** for encrypted communications.
- Ensure **GDPR compliance** to protect user data, including mechanisms for data collection, consent, and the ability for users to manage their data.
- Implement secure login for internal staff and user profiles.
- Protect against common web vulnerabilities, including SQL injection, cross-site scripting (XSS), and other attacks.
- Follow **best practices for secure API integrations**, ensuring that data is protected during transfers between the CRM and the website.
- Include a robust user role and permissions system to control access to different areas of the website.

### **Scalability & Performance:**

The website must be scalable to accommodate future growth in terms of traffic and functionality, especially as our user base expands and our content increases. The site should:

- Perform well under high traffic loads, especially during campaigns or major events. Current max traffic per day is 150K page views
- Be built to allow for easy future expansion, such as adding new content types, user interaction features, or integrating new third-party systems.
- Optimize load times and performance metrics, particularly for mobile users. This includes implementing **caching mechanisms, CDNs (Content Delivery Networks)**, and image optimization techniques to enhance speed.
- Maintain excellent **page load speeds** across devices, both desktop and mobile, with particular attention to the mobile-first design, as mobile traffic constitutes a large portion of our audience.

### **Hosting and Backup:**

We plan to host the website on **Swiss servers with Infomaniak**, and we expect the agency to manage this hosting environment. Requirements include:

- Full access to the hosting environment for both the agency and our internal team.
- Regular **backups** of the website (daily for content, weekly for full site), with the ability to easily restore data in the event of an issue.
- Continuous **monitoring and support** for hosting, ensuring minimal downtime and prompt resolution of any hosting-related issues.
- **Scalable hosting** options to handle traffic spikes during major campaigns or announcements.

Additionally, the agency should provide recommendations for backup strategies, including automated backups, and ensure compatibility with the hosting provider's backup and restore capabilities.



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## 4. Deliverables

### Detailed List of Deliverables:

- **A fully functional website:** The new website should be designed to align with the mission and goals of the World Heart Federation, focusing on global cardiovascular health. It should serve a diverse audience, including the general public, members, donors, and advocacy partners, providing clear navigation and promoting heart health awareness. The site will need to integrate with existing CRM systems, provide SEO optimization, and offer responsive, mobile-first design.
- **CMS Training:** Training should be provided for four team members who will be maintaining content in their respective departments. This includes hands-on training in managing content, creating pages, and using flexible modules for site management.
- **Technical Documentation:** Full documentation outlining the website's architecture, CMS functionality, integration points (e.g., CRM and third-party tools), hosting environment, and security protocols. The documentation should include details for ongoing site management and troubleshooting guides for in-house teams.
- **Maintenance Plan:** A detailed maintenance plan that includes regular updates of the CMS, plugins, and security patches. The plan should cover troubleshooting, CMS core updates, database maintenance, PHP version updates, and regular backups. The agency will maintain control of the hosting environment on a Swiss server (Infomaniak) with full administrative access provided to WHF.
- **Analytics Integration:** Integration of analytics tools, such as Google Analytics and Hotjar, with tracking for user behavior, conversions, donations, and engagement metrics across social media platforms (Facebook, Instagram, LinkedIn, Twitter, YouTube, TikTok, WhatsApp). Quarterly SEO strategy updates and reports are required to optimize performance. Real-time data syncing between the website and CRM through APIs should also be incorporated.

- **Reusable Backend Modules:** The website should include flexible, reusable backend modules that allow the WHF team to create pages seamlessly and easily. These modules should be adaptable, unlike the current rigid system of around 50 modules. The new system should reduce the total number of modules by increasing flexibility, making it easier to repurpose content throughout the website.
  - Timeline for module development: **Mid-December 2024 to early January 2025**. Initial modules should be available for testing by **early January 2025**, with final refinements completed by **January 25, 2025**.
- **Content Migration:** The current website contains approximately 1,500 pages. Content must be reviewed, updated as necessary, and migrated to the new website. This includes articles, images, videos, forms, and any user-generated content. The new website must also replace Google Translate with a more suitable multilingual solution to improve SEO indexing for non-English content.
  - Timeline for content review and migration: **Begin in December 2024 and complete by January 15, 2025**.

### **Timelines:**

Please include a detailed project timeline with key milestones for:

- **Discovery and Planning:** Establish the scope of the project, review the current website, and refine the information architecture. Discuss integration with CRM systems and ensure alignment with WHF's digital strategy.
  - Timeline: **November 2024**
- **Wireframes and Design:** Develop wireframes for approval based on best practices in UX/UI. Design a creative, user-friendly layout that adheres to WHF's branding guidelines. Ensure the design is flexible for content modules, responsive for mobile, and integrates social media and donation functionalities.
  - Timeline: **November to mid-December 2024**

- **Development:** Build the website using the approved design, including CMS configuration, reusable module development, CRM and analytics integrations, and SEO optimization. Ensure mobile responsiveness and real-time syncing with the CRM. Develop the donation platform if required.
  - Timeline: **Mid-December 2024 to early January 2025**
- **Reusable Backend Module Development:** Develop reusable, flexible modules to allow for easy page creation and content management by the WHF team. Ensure the system is intuitive and reduces the number of rigid modules currently in use.
  - Timeline for development: **Mid-December 2024 to early January 2025**
  - Testing and final refinements: **Early to late January 2025**
- **Content Review and Migration:** Conduct a comprehensive review of existing content and migrate it to the new website. Ensure updated content follows SEO best practices and is indexed appropriately for multiple languages.
  - Timeline for content review and migration: **December 2024 to January 15, 2025**
- **Testing and Feedback:** Perform rigorous testing, including functionality, usability, performance (e.g., page load times), and security. Ensure the website meets GDPR compliance and SSL certification. Implement user feedback for final adjustments.
  - Timeline: **Mid-January 2025 to January 25, 2025**
- **Final Launch:** Deploy the final website, including the migration of updated content. Ensure the CRM integration is functioning smoothly, and the analytics tools are accurately tracking user data. The website should be live and fully functional by **February 1, 2025**, with all essential features implemented.
  - Timeline: Latest by **February 1, 2025**

**Currently only the Launch is “hard date” every other task can be adjusted in the Discovery and Planning stage.**

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## 5. Budget

### Project Costing:

The total budget for the website creation, deployment, testing, and migration of data is **CHF 120000**. This includes all design, development, integration with the CRM, and testing phases. The agency will also need to handle SEO optimization, mobile responsiveness, and ensure the integration of social media, analytics, and third-party tools like donation platforms.

For **ongoing maintenance**, which includes regular updates, bug fixing, optimization, and creation of new features, the monthly budget is **CHF 3,000**. This will also cover support for onboarding new members (when necessary), maintenance of the hosting environment, and simple content elements like buttons or visuals.

In addition to this, if your agency is selected, we may ask for a smaller proof-of-concept website to be built before the launch of the full project. This will be handled under a separate budget and will be discussed later. However, the technology and infrastructure should align with the main website project.

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## 7. Proposal Submission Guidelines

- **Submission Deadline:** 31 Octobre 2024.
- **Format and Structure of Submission:** Proposals should include all the requirements listed on the Appendix A
- **Submit proposal to:** [Mihajlo.zelenkovski@worldheart.org](mailto:Mihajlo.zelenkovski@worldheart.org) and [borjana.pervan@worldheart.org](mailto:borjana.pervan@worldheart.org)
- **Point of Contact:** For any inquiries, please contact Mihajlo Zelenkovski at [Mihajlo.zelenkovski@worldheart.org](mailto:Mihajlo.zelenkovski@worldheart.org).

## 8. Next Steps and Timelines

- **RFP Timeline:**
  - RFP Release: 11 October 2024
  - Vendor Q&A: 11 October 2024 – 25 October 2024
  - Proposal Submission Deadline: 31 Octobre 2024
  - Vendor Selection: 1 Week Novembre 2024
- **Selection Process:** After reviewing proposals, we will shortlist candidates for presentations or interviews. A final decision will be made by 7 November 2024.

## APPENDIX A

### 1. Executive Summary

- Provide a brief overview of your understanding of our project, the proposed solution, and why your agency is a good fit for our needs.
- Include a summary of key strengths, unique approaches, or innovative ideas that distinguish your agency from competitors.

### 2. Agency Profile

- **Background Information:** Describe your agency, including its history, mission, vision, and key areas of expertise.
- **Experience and Expertise:** Provide details about your experience with similar projects, particularly in sectors like non-profits or health organizations.
- **Team Structure:** List the team members who will be working on our project, along with their roles, qualifications, and relevant experience.

### 3. Project Approach & Methodology

- **Project Plan:** Provide a detailed description of your approach to the project, including:
  - The phases of the project (e.g., discovery, design, development, testing, and launch).
  - Your understanding of our project requirements and how you plan to meet them.
  - A timeline with key milestones for each phase.
- **Collaboration & Communication:** Outline how your agency will collaborate with our team throughout the project, including communication methods and frequency of updates.

- **Problem-Solving Approach:** Describe how you address common challenges in website development, such as delays, scope changes, or technical issues.

#### **4. Scope of Work (SOW)**

- Provide a detailed breakdown of the specific tasks and deliverables, including:
  - Website design, development, and testing.
  - Ongoing maintenance and support.
  - Analytics integration and reporting.
  - Any third-party integrations (e.g., CRM, payment gateways).
  - Training for our team on managing and updating the website.
- Clarify what is included in the scope and what may incur additional charges (e.g., extra features, future upgrades).

#### **5. Project Timeline**

- Present a proposed timeline for completing the project, from discovery through launch, including:
  - Key project phases and milestone dates.
  - Estimated delivery dates for important stages (e.g., wireframes, beta testing, final launch).
  - Timelines for post-launch support and ongoing maintenance.

#### **6. Budget & Pricing Structure**

- **Detailed Cost Breakdown:** Provide a clear breakdown of all costs associated with the project, including:
  - Initial design and development costs.
  - Ongoing maintenance and support fees.
  - Costs for any third-party integrations or tools (e.g., hosting, analytics software, CRM integration).
  - Any potential additional costs (e.g., post-launch modifications or expansions).

- **Payment Terms:** Specify the payment structure, such as milestone payments, retainer for ongoing support, or hourly rates for additional work.
- **Value Proposition:** Explain why your pricing offers good value compared to the services provided.

## 7. Relevant Case Studies & Portfolio

- Provide examples of past work, including case studies or portfolio examples that demonstrate your ability to deliver similar projects. Include:
  - Websites you have developed that align with our project's goals and requirements.
  - Specific examples where you have integrated analytics, CRM systems, or other key technologies.
  - Metrics of success (e.g., improved traffic, engagement, conversions).
- **Client References:** Provide contact details for past clients who can offer feedback on your agency's performance, communication, and results.

## 8. Technology & Tools

- **Technology Stack:** Provide details about the technologies and platforms you propose to use (e.g., CMS, programming languages, frameworks, analytics tools).
- **Hosting & Security:** Explain how you plan to handle hosting and ensure the security of the site, including SSL certification, data protection, and backups.
- **Analytics and SEO Integration:** Describe how you will integrate analytics and ensure SEO optimization for the site.

## 9. Ongoing Support & Maintenance

- **Post-Launch Support:** Provide details on the type of support you will offer after the website launch, such as:



- Regular updates, patches, and security monitoring.
- Troubleshooting or technical support availability.
- Costs for additional updates or feature expansions.
- **Maintenance Plan:** Outline your maintenance plan, detailing how you will manage ongoing tasks such as content updates, backups, and bug fixes.

## 10. Team Structure & Key Personnel

- **Key Team Members:** Provide a list of the team members who will be directly involved in our project, including their roles and qualifications.
- **Project Manager:** Include the name and contact information of the project manager who will serve as the primary point of contact.
- **Subcontractors:** If applicable, provide details about any subcontractors you plan to use, including their experience and qualifications.

## 11. Risk Management & Contingency Planning

- **Risk Assessment:** Outline any potential risks or challenges you foresee with the project and how you plan to address them.
- **Contingency Plans:** Provide information about your contingency plans in case of delays, unforeseen technical issues, or scope changes.

## 12. Evaluation Criteria

- **Value Proposition:** Highlight why you believe you are the best choice for our project, specifically addressing our evaluation criteria (e.g., experience, cost, innovation).
- **Fit with Organizational Culture:** Explain how you intend to collaborate with our team and align with our organization's culture and values.