



## **REQUEST FOR PROPOSALS FOR WEBSITE AUDIT & REDESIGN SERVICES**

### **Submitted Questions and Answers (Posted 2-10-2021)**

#### **What is the expected budget for this project?**

Final budget for this project has not been determined. This RFP process was designed to align our budget with our needs for a solution. As a quasi-state agency, it is important for us to be mindful of how we spend our dollars and the value we receive.

#### **Who is the incumbent agency if there is one?**

There is no incumbent agency, and we currently work with a stable of vendors for marketing services. However, this RFP is seeking a specific service as outlined so a competitive process is necessary.

#### **Is there a preference for in-state bidders?**

As a quasi-public agency serving Connecticut residents, we value supporting local businesses and vendors. We will balance the location of the bidders with the qualifications, skills, and proposal of all submissions.

Bidders from outside of Connecticut are welcome to submit proposals. We do have a preference for companies headquartered in the United States.

#### **Is there any requirement for the vendor to be on site?**

No. Due to the continued COVID-19 restrictions and precautions, there is no requirement for any vendor to be on site. Meetings can be handled virtually.

#### **Would you consider highly qualified out of state applicants?**

Yes.

#### **Can responses be submitted via email?**

Yes. Per the RFP, responses should be submitted via email to Rudy Sturk at the following email address: [rudy.sturk@ctgreenbank.com](mailto:rudy.sturk@ctgreenbank.com). The subject line should be identified as: "Proposal for Website Audit and Redesign."

**Will the award be based on the lowest cost bidder?**

Award will not be solely based on the lowest cost bidder. However, pricing is one of the key elements that will be taken into consideration.

**How many vendors will be awarded?**

We anticipate awarding only one vendor for this RFP.

**Do you anticipate extending the bid due date?**

No.

**What additional details are you willing to provide, if any, beyond what is stated in bid documents concerning how you will identify the winning bid?**

Please follow the proposal format and requirements in the RFP.

**Other than your own website, where was this bid posted?**

On the Connecticut Department of Administrative services bidder website.

**Can you confirm if there is an existing brand book or messaging architecture? Are you expecting this to change as part of this project?**

There is existing brand messaging, and we are currently revisiting our thinking around brand hierarchy. We do anticipate aligning these during this project.

**While reviewing the different properties mentioned in the RFP there seems to be unique brand elements for each. The RFP mentions consolidation of web properties. Will these brands need to stay intact or is the desire to see them pulled more into the main CT Green Bank brand?**

We are open to suggestions on the best approach. We do believe some integration of existing assets/properties makes the most sense going forward. Brand elements will be more closely aligned with revisions to Green Bank brand hierarchy exercises currently in process.

**Does your team plan to create necessary content to bring the new site to life or will you be looking for content creation as part of this (or the future phase 3 RFP)?**

We anticipate the need for new content which will be created through internal and external resources. We see that as part of the future RFP, but seek guidance on that new content as part of this RFP.

## **Questions Received After February 10, 2021 (Posted Feb. 23, 2021)**

Some questions have been removed/consolidated due to duplication. Please see earlier pages as these cover broad answers. Some questions delved into topics best covered during the discovery process between the Green Bank and selected vendor, and have also been omitted. Overall, keep in mind that we are seeking a partner in this process.

### **Satellite sites questions**

**According to the RFP, Green Bank's current web properties cover 8 websites. What are the expectations of Green Bank regarding the content and user journeys of the different web properties? Is Green Bank open to consolidate the multiple web properties into one single portal with different journeys for the different audiences? If kept separate, should the web properties design be consistent across all satellite sites?**

We are open to consolidation of the websites, if that makes sense. We are seeking ways to improve the overall user experience. As stated in the RFP, one of the goals of the project is the "Consolidation of multiple web properties and / or to provide seamless integration and user experience with external properties." We are open to recommendations on the best way to make this work.

**Do any of the site's share content/reuse the same copy or images?**

There is some overlap of copy and images

**Do you have a preference in terms of the CMS? Would you like to stay on WordPress, or would you be open to moving to a different open source CMS, i.e. Drupal?**

Most of the sites are currently on WordPress, and we would prefer this option.

**While reviewing the different properties mentioned in the RFP there seems to be unique brand elements for each. The RFP mentions consolidation of web properties. Will these brands need to stay intact or is the desire to see them pulled more into the main Green Bank brand?**

As mentioned in the RFP, we are seeking to achieve "consolidation of multiple web properties and / or to provide seamless integration and user experience with external properties." We are seeking recommendations on this process.

**Do we need to focus on particular web properties as being more important than another for migration vs. integration?**

The three main sites are ctgreenbank.com, cpace.com and gosolarct.com. These are robust properties, while the other sites are smaller in scope, designed to support specific campaigns.

**Are we auditing just [ctgreenbank.com](http://ctgreenbank.com) or all 7 satellite domains?**

The audit should focus on the main ctgreenbank.com site. However, we want recommendations on how satellite sites could be integrated, so you will need to review them at least at a high level.

**Phase 2 Bullet #2 mentions providing content maps. Is this for all website properties or just the main site? Beyond looking for consolidation points with the main site, is part of our Phase 2 strategic mission to reorg that site (and the other web properties that stay on their own)?**

Content map request is for the main ctgreenbank.com site. The cpace.com and gosolarct.com sites are the two next most important and complex sites. We are not seeking specific recommendations on the reorganization of those sites, but more seeking opportunities to consolidate as part of the new site.

**Are there factors we need to be aware of like platform requirements (e.g., does the bond site have to stay on Bond Link)?**

The Bond Link site will most likely stay as is, where is. The other sites do not have platform requirements, though we prefer staying with Wordpress for the main site.

## **Vendor selection questions**

**Would you be open to working with a firm from Washington DC or are you looking for a local firm? Is there any preference (points awarded) for local agencies?**

We are open to proposals from firms across the United States. We will have a preference for local, regional, and national agencies in that order. With so much talent in Connecticut and the United States it is unlikely that we will select a vendor from outside the country.

**Would Green Bank require physical meetings for the work sessions and/or presentations in Phase 1 or Phase 2?**

Based on the current pandemic, we do not anticipate physical (in-person) meetings.

**What is most important to you when selecting a partner?**

Please follow the proposal format outlined in the RFP. We will have meetings with selected vendors to help make our decision after proposals are reviewed.

**Would the selected vendor for Phase 1 and 2 be barred from working on Phase 3?**

No.

**Would you consider having the chosen vendor also work on Phase 3 without an RFP process?**

As stated in the RFP, it is anticipated that we will have a separate RFP for Phase 3.

## **Existing tools/research questions**

**Do you currently track and report out on your site(s) usage/conversion etc. via google analytics or the like?**

Yes, we use Google Analytics for reporting.

**Do you require a Hosting agreement?**

No.

**What third party digital tools or systems, aside from Pardot/ Salesforce are your teams using?**

Pardot. Salesforce. Google Analytics. Calendly.

**What level of integration is desired for Pardot and Salesforce tools?**

Forms on the site should integrate with Pardot/Salesforce. This does not have to be API integration.

**Can we get access to the Pardot and Salesforce instance to review setup during the audit and analysis phase?**

Yes.

**Could you list all integrations currently on the site? Would these integrations need to be done as part of Phase 2 or would you require recommendations only as part of Phase 2 with implementation happening in Phase 3?**

See above. Recommendations in Phase 2, implementation in Phase 3.

**Will any and all marketing, sales, and CRM strategies that are related to digital marketing be shared with the awarded Contractor?**

Yes, as appropriate.

**Will you provide access to audiences/end-use customers as part of the audit?**

Yes, as appropriate.

**Will the awarded Contractor have access to any existing marketing vendor resources that may be necessary to gain information from during the engagement?**

Yes, as appropriate.

**Regarding the existing WP CMS, what current functions are being accomplished by this CMS? Is there anything that is customized that we should be aware of?**

The Wordpress sites use a number of common plugins. The current Find a Contractor tool on [www.ctgreenbank.com](http://www.ctgreenbank.com) is a custom tool, however, this will be replaced in coming months with another tool. A future goal is to have one Find a Contractor tool that could work for all the sites and services.

**In regard to the design of the website, do you want to use only themes / templated designs or allow for Custom design? Or do you want to avoid themes / templates and only do Custom designs?**

We are open to both themes/templates and custom designs. Our sites currently use templates.

**What type of testing/feedback tools and methodologies is Green Bank currently using to elicit implicit/explicit feedback from your users? How is that driving strategic decisions?**

We do not have this type of user feedback built into our current sites. We are currently looking into adding this.

**If we include customer interviews (with your target audiences) in our proposal, would Green Bank be able to provide us with a list of customer/client names to recruit from?**

Yes, we could.

**Has Green Bank recently completed qualitative or quantitative surveys, or other research initiatives to better understand your customers' experience/needs? How do you gauge their success, happiness?**

We have not conducted this research. We see this as part of Phase 1 of this project.

**In the RFP, it is stated that the provider should deliver 3 options for look/feel and layouts design. Does these 3 options should include both desktop and mobile?**

Desktop and mobile options should be included. Site should be designed with different user experiences in mind.

**Has Green Bank selected a preferred content management system for the new site? Do you wish to maintain Wordpress – or are you open to CMS recommendations?**

We prefer Wordpress.

**We expect that discussion and further clarification around technical requirements and functionality (e.g., tools, content management system, etc.) will take place during discovery. Strategic recommendations including scope and cost estimates will be further defined within the redesign plan. Are you open to this approach?**

Yes, absolutely open to this approach.

**You mentioned looking at other green banks, state energy efficiency websites, capital providers/lenders, etc. to do a comparable analysis, do you have any websites that you like or certain aspects that you like on the other websites?**

Yes, we would provide a list of these when we get further into the process.

**Do you have any examples of websites you like?**

Yes, we will provide examples.

**What is the expectation on the comparable sites number, please provide us the approximate number?**

We would provide a list, likely between 5-10 sites for comparison.

**Can you confirm that during the discovery phase we will get access to the site's backend and analytics?**

Yes.

**Should it be assumed that a mobile friendly site, such as a responsive site is a requirement?**

Yes.



## **Marketing/brand questions**

**You say you want this project to touch on the look and feel of the site; do you need full re-branding work done, or are you happy with the foundation of your existing brand assets?**

We are not doing a full re-brand. We are working on revising our hierarchy, and this will be discussed as part of the Phase 1 discovery process.

**In the RFP, a “revised brand hierarchy” is mentioned. Is this work currently underway?**

Yes, this work is currently underway.

**Is it a functional, updated look-feel for the site alone, or is this also considered a brand refresh that will be used across non-digital assets as well?**

The focus of this RFP is web properties. This is not a brand refresh.

**Who are key project stakeholders and decisions makers for this initiative?**

The Green Bank’s marketing and operations teams, as well as senior staff, will be the decision makers.

**Stakeholders: How many stakeholders are there? Are they all at Green Bank, or from a variety of organizations? Are they fairly aligned in their future vision for Green Bank or do they have a range of opinions — or maybe this is not even known at this point?**

In addition to marketing, operations, and senior staff, we anticipate involving our programs teams in this process. There will likely be a range of options that will be overall mission aligned but may diverge in delivery.

**How many different audiences are you hoping to include in the discovery process and could you provide a brief description of each audience?**

Regarding audiences for the discovery process, we are open to recommendations since the site(s) are currently serving many diverse groups. Residential consumers (homeowners) is the largest traffic segment, likely followed by contractors, but staff discovery on use/expectation is important too.

**Is the target audience(s) assumed to be the same across all 7 properties?**

While the audiences do overlap across the sites, there is variance. Focus should be on the main ctgreenbank.com site with thought given to satellite site integration. Please see previous “satellite” section in this document for more.

**What are the challenges that you and your team face most with the existing website(s)?**

The site is over 6 years old and needs a strategic and design refresh. While the Green Bank has evolved over these years, the site has not.

**The RFP mentions a recent brand messaging evolution as well as coordination with a digital media vendor. What additional brand and/or marketing initiatives will overlay with the website redesign?**

In addition to the hierarchy and messaging work, we will continue to run marketing campaigns to support the brand, programs, and initiatives through multichannel approaches.

**Is there a need or desire for content marketing operational support as part of your award scope?**

No, this is not part of this award scope.

**Are all the brand assets completed (logos, fonts, colors, imagery style, etc.) for Green Bank and all other web properties, or will they be completed by the time a contractor is selected?**

Yes, new items are in the creation process now. Keep in mind, this is not a brand refresh, but a website refresh.

**The proposal said that the current Green Bank site houses documents and information for the Board of Directors. Are these documents files available through specific links, or can board members log in to view them (i.e., a portal)?**

The Board related materials on the site are for public access and anyone can review these. No portal access required.

## **Pricing**

**Please clarify whether you require a fixed price quote, or a time and expenses quote based on hourly billing rates.**

Please be as clear and detailed as possible in your pricing. This will be a main factor in our decision process. We prefer fixed price quotes for Phases, but please include hourly billing rates for reference if needed.

**In Phase 2 Bullet #6, there is mention of providing scope and costs associated with “good, better, best” options. However budget numbers would be difficult for us to provide as this would ultimately be part of the Phase 3 Design/Development proposal — especially since potential development costs would be a key factor. That said, for Phase 2 we could provide pros/cons of different options without budget specifics. Does this work?**

Yes, we would like flexibility and clarity in all pricing. We want to be able to best compare the proposals and see how they align with our needs.

## **Process questions**

**I see that the project is a 3 phase project. Could you please confirm that phase 1 would basically be discovery and audit, while Phase 2 would be design (UX and Visual Design which means creating wireframes and information architecture) and planning for implementation (Development)? With Phase 3, development to be completed as part of a separate RFP?**

Yes.

**Are you anticipating that the consolidation would happen in Phase 3 with recommendation on how to do so as part of Phase 2 plan?**

Yes.

**Will we be responsible for migrating all the content?**

We believe that is a task for implementation in Phase 3.

**Implementation is not part of the scope of this RFP. Please confirm our understanding**

Yes, implantation would be part of Phase 3 and will likely require a separate RFP.

**When we do projects like this there is often a lot content recommendations. Does your team plan to create necessary content to bring the new site to life or will you be looking for content creation as part of this (or the future phase 3 RFP)?**

We see this as part of the future phase 3 plan.

**In Phase 2 Bullet #2, it mentions providing 3 options for “look/feel and layout designs.” However, this feels pre-mature for a web strategy and we’re not sure we’re interpreting bullet this correctly. With this in mind, we want to confirm that the deliverables for Phase 2 are wireframes for a set of key pages that illustrate/provide a proof of concept of our strategic recommendations — but that we are not creating pixel-level design treatments in Phase 2. Is this correct?**

Yes, you are correct. Wireframes for a key set of pages as proof of concept to your strategic recommendation. Pixel-level work is a Phase 3 task

**During the Audit and Analysis phase, we recommend that it be a collaborative process where we discuss certain observations with your team? Are you opposed to this approach?**

We agree that this process needs to be collaborative. We want recommendations, but we want to be sure that the vendor understands the Green Bank and our needs.

**Please confirm whether the new content creation and media contents would be provided by Green Bank?**

New content would be created by Green Bank and partners. This is not part of this RFP's scope.

**Are there any attachment file size limits for sending email attached files to [ctgreenbanks.com](mailto:ctgreenbanks.com) email addresses?**

Yes. We will confirm receipt of proposal however if your email bounces back undelivered, we didn't get it. If you anticipate this will be an issue, consider sending dropbox or similar, send reduced sized PDFs, or multiple emails.

**After mutually agreed-upon processes are defined, will the marketing team (or another internal team) source and oversee testers for surveys, feedback sessions, and user testing?**

The marketing team can help with choosing/sourcing testers as needed, if this is part of the agreed-up process.

**What level of ADA compliance is required? There are different levels and each organization decides the level that fits them?**

We would need more information on this.

## **Timeline**

**What is driving the timeline proposed in your RFP? Is timing more important than getting it right? Are you open to incremental improvements?**

The timeline proposed in the RFP is not set-in stone. We are open to recommendations and suggestions. We know this is a big project, and are seeking significant improvements over incremental changes.

**What is driving the two-month timeline for phases 1 and 2? Are you open to receiving proposals with different timelines?**

We set deadlines based on a desire to keep this process moving forward. However, we are open to recommendations on timelines.

**Please provide any seasonal constraints when your subject matter experts may not be available to participate in project activities.**

No seasonal constraints.

**What is the expected start date of the redesign project? Are there any business drivers we should know about in relation to the project schedule?**

Please see RPF for timeline. As stated above, we are open to alternative timelines.

**Phase I and II have a relatively quick turnaround. What is each department's expected involvement level?**

This is a marketing initiative and the marketing team will drive the process of involving other internal teams. We want to build inclusion among our internal stakeholders, including program teams and senior management. We are to create a web environment that meets their expectations and needs. This means getting their feedback and input during the process.

**What is the anticipated timeline for Phase III? Do you have preliminary high-level details on those expectations or goals to share?**

We anticipate Phase 3 starting sometime shortly after July 1, 2021. Phase 3 is focused on building out the site based on recommendations from Phases 1 and 2.