



Request for Proposals CanREA website management contract

Proposal due date: July 11, 2022

Purpose

The Canadian Renewable Energy Association (“CanREA”) seeks to enter a partnership contract with a Canadian website design/ development/ management company (“the Company”), to collaborate with us on the management, cybersecurity and ongoing development of CanREA’s existing website.

Project overview

CanREA is looking for a new website management partner who can manage the website renewablesassociation.ca for us.

The new company will need to collaborate with our current website management company for a transition period, which needs to happen in August, 2022, to ensure an orderly hand-off of all current tools and services by the end of August, 2022.

CanREA’s communications staff is responsible for content creation and routine web editing tasks (posting new pages within the existing menu structure), but CanREA staff does not have any technical web editing, web design, web development or website management skills. These are skills that the web development company must provide.

About CanREA

The Canadian Renewable Energy Association (CanREA) is a B2B member-based advocacy association. It has approx. 300 member companies who are active in Canada’s wind energy, solar energy and energy storage industries, including renewable energy project developers and equipment manufacturers, as well as firms that provide associated services to these companies (legal, insurance, etc). CanREA represents this industry through engagement events and advocacy work with governments and regulatory bodies, working to ensure that wind energy, solar energy and energy storage play a central role in transforming Canada’s energy mix. As such, CanREA is the voice for wind energy, solar energy and energy storage solutions that will power Canada’s energy future.

Purpose of CanREA’s website:

- The website is CanREA’s most visible marketing and communications tool.
- The website must serve all of CanREA’s core audiences: current members, potential members, business journalists, climate change NGOs and partners, and electricity system influencers (decision-makers in each province and at the federal level). Members of the public are not a key audience at this time.
- The website must accomplish several things: it must inform CanREA’s core target audiences about the value of wind, solar and storage technologies using our key messaging; it must showcase CanREA’s thought leadership and advocacy wins (progress made); it must promote the strong value of a CanREA membership; it must help CanREA with marketing and revenue

generation (promote upcoming events and membership recruitment campaigns); and it must track and encourage conversions (such as asking for more information on membership, clicking “register now” for our events, signing up for our newsletters, or following us on social media).

Particularities of CanREA’s website:

- The website is bilingual (English and French)
- The website was created from scratch in 2020.
- The website is in WordPress, using a 100% custom, hard-coded theme.
- The website is mobile-responsive.
- The website has a public-facing side, plus a password-protected, members-only side.
- The website is integrated with a member database tool, Wicket.
- The website design is minimalist and very clean, respecting our brand style guide.

Scope of work

1. **Tools and technical services needed for the backend:** Managing all external tools and technical services, such as WordPress, hosting services (we currently use Kinsta), DNS management (we currently use Cloudflare), mailing (we currently use Mailgun), domain name registrars (we currently use GoDaddy, Rebel and others), various plugins, and other tools as needed.
2. **Cybersecurity services needed in the backend:** Providing strong cybersecurity services for the website (robust risk-reduction measures, proactive prevention through monitoring and scanning, and commitment to thoroughly resolve any issues that might arise). Any security issues should be addressed in real time and not wait for the pre-scheduled meeting.
3. **Client services (regular touchpoints, open lines of communication, responsiveness and availability):** Working closely with CanREA’s Communications team to advise on web-related matters, and to assist them in adding new content to the website, making minor adjustments, and troubleshooting as necessary. To that end, CanREA would like to have a weekly or biweekly MSTeams meeting with a dedicated account manager. These meetings will serve as the pre-scheduled moment for CanREA to flag issues and to introduce new projects, and this face-to-face communication will ensure both parties have a mutual understanding of the scope of the request, potential issues arising from the request, potential solutions to these issues, and a clear timeline for fixing issues or executing new projects. These meetings will also be a time for the company to provide progress reports on ongoing projects, and to explain, discuss and address any issues that have come up with these projects. In addition, CanREA will sometimes wish to use this weekly or biweekly hour for training purposes (to train new CanREA staff or to provide a refresher for current staff in a relevant aspect of editing or improving the website).
4. **Web development and project management services:** CanREA has a relatively new website, created from scratch in WordPress in 2020. We are not looking to redesign the website at this time. However, we aim to make one major front-end website improvement per quarter. All web development work must respect the particularities of the website. One improvement per quarter should be budgeted for within the regular maintenance contract. These improvements might include such things as: optimizing the site map and navigation, adding conversion tracking to a landing page, adding a new tab to the top menu (corresponding to a new section of content); adding an archive feature to display our enewsletters (linked with MailChimp) and promote new newsletter subscriptions; adding a library of downloadable resources; Gutenberg blocks;

adding a more robust Events section, where each upcoming event can have a set of sub-pages (for program, speakers, hotel/travel info, and a link to a registration website).

5. **Collaboration work:** The website management company will need to collaborate effectively and collegially not just with CanREA, but also with CanREA's other service providers whose tools are used on the CanREA website, namely: the firm who manages our member database, our IT services team, and potentially other providers in the future.
6. **Extra potential web development work outside the contract:** In addition, CanREA will likely require other web development work over the coming years, not included in the regular maintenance contract. These projects are to be determined, and would be proposed and budgeted separately from the regular contract. For example, it is possible that we will want to revamp the members-only side of the website to make it more effective; and/or to convert the public-facing website from its custom WP theme to a "WP Astra" theme framework with a child theme on top of that; or other significant work to be discussed. We expect the website management company to be able to accommodate these projects as well, with sufficient notice for planning purposes. **Graphic design work, Google Analytics reporting:** This is also outside the scope and would be paid separately.

Budget

CanREA estimates this contract at approximately \$3000-4000 per month all told, for a total of approximately \$36,000 to \$48,000 per year. As a non-profit organization with a limited budget, CanREA will consider proposals that achieve a reasonable intersection of quality and cost.

This excludes the domains (approximately \$2,000) and the potential web development projects that are described above as outside the scope of the contract.

How to make inquiries

For further information, CanREA encourages proponents to reach out to CanREA in advance of their submission to seek clarification on outstanding questions related to this RFP. All inquiries must be submitted in writing. The deadline for submitting questions is June 22.

Answers or comments provided by CanREA will be shared with all proponents via email. Our goal is to ensure that all Proponents are equally well informed of CanREA's expectations. Answers will be provided by June 29.

Proposals must include:

- A cover letter stating your name, title, company, address and contact information, as well as an explanation of your interest in managing CanREA's website.
- Some background on your company, including your areas of expertise.
- A narrative that addresses how your company will fulfill all of CanREA's web management requirements, including the transition in August.
- Information on the team you would assign to this contract: total number of personnel, their roles and experience.
- Your experience with and preferred approach to client relationship management, and your commitment to CanREA.
- Your experience with and preferred approach to project management, and your commitment to CanREA.

- Your experience with and preferred approach to collaboration and your commitment to CanREA.
- A list of 3 or more clients we can contact who can provide a strong reference (nonprofits or member-based associations an asset).
- Links to 5 websites you currently manage (nonprofits or member-based associations an asset).
- Your estimate of the time required per month to meet CanREA's requirements.
- Your estimated budget for this work.
- Your team's hourly rate for additional work if required (work that is described above as outside the scope).
- A commitment to the timeline for the transition from the current web development company in August.

How to submit your proposal:

Proposals must be submitted no later than 5:00 PM (EST) on Monday, July 11, 2022.

Proposals must be submitted electronically, by email.

Please send a single PDF attachment. CanREA encourages proponents to submit proposals that are 10 pages or less, excluding cover page and any appendices.

Please use "CanREA website proposal" in the email subject line.

It is the responsibility of the proponent to ensure that the proposal is received by CanREA by the date and time specified above. Late proposals may not be considered.

Proposals should be sent to:

Bridget Wayland
 Director of Communications
 Canadian Renewable Energy Association
bwayland@renewablesassociation.ca

Please note that all costs incurred in the preparation of a proposal responding to this RFP will be the responsibility of the Proponent and will not be reimbursed by CanREA.

Evaluation Metrics and Criteria

Each proposal will be evaluated through a lens that considers the Proponent's ability to:

- **Meet transition deadline of Aug 31**
- **Manage all external tools and technical services needed for the backend** (WordPress, Kinsta, Cloudflare, Mailgun, various plugins, etc.)
- **Provide strong cybersecurity services** to keep the website and linked services safe. Proven expertise in cybersecurity to keep member data safe and an abundance of caution.
- **Commitment of resources to** one major front-end website improvement project per quarter.
- **Provide excellent client services:** good communication, responsiveness and availability, including a weekly or biweekly MSTeams meeting with a dedicated account manager. References that can demonstrate the company's commitment to client relationships and proven project management skills.

- **Accommodate potential extra web development work** that is outside the contract, with sufficient notice, to be billed separately.
- **Demonstrate successful collaboration** and a commitment to collaborate effectively and collegially with CanREA’s other service providers whose tools are used on the CanREA website.
- Demonstrate experience managing **bilingual websites** (E and F)
- Demonstrate experience managing **websites with a private, members-only side**.
- Demonstrate experience managing **websites for member associations** and/or advocacy organizations and/or nonprofits.
- Demonstrate experience managing websites with an **integrated CRM database**
- Demonstrate experience **respecting brand style guides** for an organization in graphic design work.
- Demonstrate a commitment to continually learn about **evolving best practices** and to recommend improvements
- Additionally, CanREA will assess the expertise and **experience of the key staff** expected to be engaged in the contract. The submission should identify the specific personnel who will be assigned to this project and their responsibilities.

Below is a chart outlining the evaluation criteria:

Evaluation Criteria	Score /10
1. Can start in August and meet the transition deadline of Aug 31.	
2. Will manage hosting, plugins, and all other technical tools and services.	
3. Will provide strong cybersecurity services.	
4. Will carry out one major front-end website improvement project per quarter.	
5. Estimate is within CanREA’s budget range, and they can accommodate extra web development work outside the contract.	
6. Dedicated account manager will commit to a weekly or biweekly meeting with CanREA, and personnel assigned to our project have relevant expertise and experience.	
7. References demonstrate their good client relationships and project management skills.	
8. Experience managing bilingual websites (E and F).	
9. Experience managing websites with a private, members-only side.	
10. Experience managing websites for member associations/ advocacy organizations/ nonprofits, with an integrated CRM database	
TOTAL SCORE OUT OF 100:	

Evaluation and Interviews

The RFP evaluation committee, consisting of three CanREA staff and/or Board members, will assess each proposal according to these criteria. Each criterion will be scored from 0 to 10, with 10 being the highest score. There are 10 criteria, for a total score on 100. The scores for each proposal will be collated. The Committee will then meet to review the results and come to a consensus. The company with a minimum score of 3 in each scoring category and the highest overall score will be selected to proceed with partnership agreement discussions.

Following the evaluation process and criteria analysis, the selected Proponent will be invited to a meeting with CanREA to review the proposal and to initiate discussions with the aim to agree on the terms of the contract. As part of this discussion, CanREA reserves the right to suggest modifications to the arrangement as part of an open discussion with the Proponent.

- If an understanding can be reached, and there is a consensus on the scope of work, timeline and payment terms, the Proponent and CanREA will then proceed to finalize the contract.
- If the selected Proponent and CanREA fail to reach a consensus on the scope of work, timeline and payment terms, discussions may be terminated. Subsequently, the Proponent with the second highest aggregate score overall (with a minimum score of 3 in each category) may then be invited to participate in discussions with CanREA with the aim to enter a contract.
- **CanREA envisions the contract will be for a period of one year, renewing each July 1, with an automatic extension each year unless otherwise indicated in writing at least four months before the end of the contract (by February 1). However, CanREA is open to discussions regarding the terms of the arrangement.**

Notification

All unsuccessful Proponents will be notified following the final signing of the contract.

Timeline

CanREA intends to follow the timeline below for review and award of this contract:

1. RFP posted: June 15, 2022
2. Questions cut-off date: June 22, 2022
3. Answers to questions: June 29, 2022
4. **Submission close date: July 11, 2022**
5. Evaluation of proposals and interviews: July 13-20, 2022
6. Contract awarded: July 27-August 1, 2022
7. **Contract commences (transition): August 1, 2022**
8. Transition process ends: August 31, 2022
9. Contract renews: July 1, 2023

Closing

CanREA thanks you for your time in reviewing this RFP. We look forward to hearing from you by July 11.