

CMS and Website Redesign RFP Template

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Project Overview

Give the vendor a high-level understanding of the type of project this is. Are you looking for a new CMS? Are you looking to upgrade your existing CMS? Are you looking for a complete redesign and new information architecture? Why are you undertaking this project? Are there any specific drivers?

Client Background

Tell the reader a bit about your organization. Are you a trade association, a professional association, something different? What is your mission/vision? Who are your constituents? How many staff do you have?

Project Impetus

What is the impetus behind this project? What are the goals and objectives driving the engagement? How will success be measured post go-live?

Project Scope

Discovery

Have you begun any discovery efforts on your own? Will these materials be made available to the vendor? Approximately how many stakeholder interview sessions do you envision (vendors typically want to have at least one meeting with each business unit that will be impacted by the project).

Sitemap

Is your current sitemap and navigation effective? If you believe so, would you like to test it? If not, would you like the vendor to develop a new sitemap and navigation structure as part of this effort? Do you have a taxonomy in place? If not, should the vendor help you develop one? Approximately how many pages of content exist on the site currently? Do you plan to overhaul any content as part of the redesign? Will you need assistance developing / optimizing your content? What sort of SEO efforts are in place currently? What will you need assistance with in the future?

Layouts

How many unique layouts do you anticipate needing?

Website Redesign

Why are you redesigning the website? What do you hope to accomplish? Do you have a style guide in place? Will you be rebranding during this effort, or keeping your core brand elements in tact? Do you anticipate any shifts in your brand? (i.e. we want to appear less conservative) How many distinct design directions do you desire? (two is most often the standard)

User Testing

Would you like the vendor to conduct user testing? If so, at what stage? Before work begins? Throughout the process? Prior to go-live? What type of testing do you prefer, or are you open to recommendations?

Content Management System

Do you have a preference for a particular technology stack? Do you prefer an on-premise hosted or cloud hosted environment? What features / functionality do you require? Describe your needs for:

- Publishing workflow
- Content administration
- Personalization
- Search
- Multi-site management
- Multi-language support
- Automated marketing
- Analytics
- Dynamic user-facing functionality (dynamic maps, locators, etc.)

Integration Requirements

What will the CMS need to integrate with? Do you have an AMS or CRM, LMS, community platform, journal solution, e-commerce system, single sign-on, etc.? What technologies are in place currently? What, if any, new acquisitions do you intend to make in the future?

Support Requirements

What type of support do you require? Regular business hours? 24/7 support? How big is your internal technical team and what kind of skill sets do they have (HTML, CSS, Java, .Net, SQL, networking, etc.)?

License Considerations

CMS systems have varying ways of determining license costs. Factors often include:

- Number of concurrent admins / number of total admins?
- Page views
- Number of unique URLs
- Number of servers (i.e. load balanced, production, staging, development)

Timeline

What is the timeline for this engagement? Provide the vendor with:

- Deadline for questions to be asked; will you allow questions over the phone or in writing?
- Date you will respond to all questions; will all vendors receive the Q&A from all vendors?
- Deadline for notice of intent to bid
- Presentation dates
- Decision date
- Projected project start date
- Projected project completion date
- Any blackout dates that your team may have during the project

Budget

What is the budget you would like to stay within for the engagement? Is it inclusive of all costs? Or will license, hosting and maintenance be budgeted for separately?

Additional Factors

Are there any additional factors that may affect the project? For example, are you implementing a new AMS (or other major business system) at the same time? Are new senior leadership staff coming on board during the project?

Response Criteria

Tell the vendor what you expect in their proposal. Requests might include:

- Corporate overview / background (you'll want to select a vendor that has CMS and design as their core competencies)
 - Length of time in business
 - Key staff bios
 - Sample client list (you'll find great benefit in working with an organization who deeply understands associations / member-focused organizations)
- Project process (for both design and CMS implementation)
- Project management process

- Options for post-project support
- License terms
- Case studies / relevant experiences (you'll want to look for specific experiences that mirror your upcoming engagement)
- References (you'll want to talk to references about the level of creativity of the vendor, are they proactive v reactive, are they knowledgeable, are they easily accessible, do they support their clients after the launch)
- High-level project timeline (will often be re-evaluated after Discovery, but an initial high-level timeline may be helpful for you)
- Cost estimates
 - Terms
- Evaluation criteria