



## Design RFP: Questions from Bidders

This Q&A does not include questions that were duplicative and does not include questions relating to information that would be discussed during negotiation and/or the discovery phase of the project.

1. Are you able to share a budget range for this project?

**Our budget is flexible depending on the quality of proposals and alignment with project scope. We intend to meet or exceed industry standards for national non-profit organizations of our size. We encourage all firms to submit competitive proposals with reasonable costs assessed for requested deliverables.**

2. How extensive are your current brand guidelines, and how big of a change are you looking for? I.e. a complete change of logo, colors, fonts, etc., or a lighter refresh, expanding and modernizing the brand system that you have?

**We are looking to strengthen our brand and visual identity, and we expect the selected firm to offer strategic recommendations on what needs to be changed to meet our goals. This may include a logo re-design, but all proposals should focus on a visual identity design scope. Our current brand guidelines and style guides are minimal (only fonts, colors, and a few logo variations).**

3. Can you list all templates that need to be created for the new brand?

- **Fact sheets/one pagers (1-3)**
- **Presentation template (1)**
- **Social media templates (5)**
- **Email banners (3)**
- **Letterhead / whitepaper design (2)**

4. To make sure we deliver templates for presentations, reports, etc. in a format that works best for your team, could you let us know which tools or software you're most comfortable using? Options could include Adobe InDesign, Canva, Google Docs, Word, or PowerPoint, depending on your needs.

- **For fact sheet/one pagers, InDesign**
- **For presentations, PowerPoint**
- **For social media and email banners, Canva**
- **For letterhead / whitepaper, Word**

5. How has your experience been with Contentful? Are you open to switching to Drupal or WordPress?

**We are open to switching CMS if the needs assessment and requirements can't be met with Contentful.**

6. Do you have any existing user research?

**Yes – we have developed audience personas and conducted stakeholder analysis. We also have insights from social media advertising. Proposals should detail plans to delve deeper into user research through a purely digital / web lens.**

7. In your mind, who are your target audiences and what are the key tasks they come to your site to do?

**Our target audiences are advocates, community lenders/philanthropy, decision makers, consumers, and industry (developers, workforce). Our main goals with our site are to educate and inform these audience about our work while engaging them around relevant opportunities.**

8. Can you share more about your expectations for the quarterly dashboard for reporting? Is this the interactive public dashboard of Climate United's investments and activities?

**Yes. Expectations are flexible and we welcome creative ideas. More details will be developed once a firm is selected.**

9. Could you please clarify if you have a preferred email system such as Mail Chimp etc.?

**We are looking for expertise in custom HTML web email design, particularly Pardot. Design services for MailChimp, Campaign Monitor, and similar systems should not be included in proposals.**

10. Where is the content coming from? Has it already been created? Do you have internal resources to create needed content or will we be curating?

**Content is being generated both in-house and from other contracted agencies. Proposals should not include copywriting services except for necessary enhancements for SEO.**

11. Do you need a VPAT certificate along with accessibility compliance, or will compliance suffice?

**We are focused primarily on compliance but will consider other certifications.**

12. What have been your challenges/frustrations with the current visual identity

**Our brand, website, and visual identity were created before Climate United was awarded a \$6.97B federal award under the Environmental Protection Agency's Greenhouse Gas Reduction Fund. Now that the funds have been obligated and investments have begun, we are looking to refresh and modernize our visual identity and website to reflect an established organization.**

13. Are there key milestones/timings for delivery that we should take into account?

**We are looking for reasonable timelines for key tasks and deliverables to be included in the proposal. We will also take into account quality and cost when assessing timelines and milestones.**

14. How many agencies are submitting an answer to your RFP?

**We will not know the total number of proposals until after the submission deadline.**

15. What is your internal sign off process for this project?

**Climate United has robust internal agency management, feedback, and approvals processes.**

16. Can you tell us about the team we will be working with at Climate United?

**You can learn more about the Climate United team here:  
<https://weareclimateunited.org/staff>**

17. Who are your stakeholders?

**The Climate United coalition is formed by Calvert Impact, Community Preservation Corporation (CPC), and Self-Help. Together, the partners bring decades of experience directly deploying more than \$30 billion of private and institutional capital to address climate change and provide new, lasting economic opportunities in low-income and disadvantaged communities that have long faced underinvestment and have also borne the brunt of pollution.**

**Our [Board of Directors](#) and [Advisory Council](#) include key stakeholders and help guide our work.**

18. If a firm submits for both Task 1 & Task 2 is there a chance that they would only be selected for 1 of the tasks?

**We will select the best proposal for each task. They may be from the same respondent, or from two different respondents.**

19. Requesting an extension to January 17<sup>th</sup> instead of January 8<sup>th</sup>

**We are not planning to extend the deadline for this RFP.**

20. How important is vendor diversity status to overall decision?

**The diversity metrics are optional. However the organization's status as a DBE is a second tier metric.**

21. Once proposals have been submitted, when does Climate United anticipate awarding vendors with work?

**In late January or early February, depending on further conversations with respondents.**

22. What is the anticipated start date of work?

**The anticipated start date is February 1 but may be subject to change.**

23. What is your preferred frequency and format for progress updates and reports?

**Meeting cadence, updates and reporting format will be negotiated with respondents after they have been selected. A proposed meeting and reporting cadence can be included in the project plan.**

24. What are your expectations for scaling resources up or down during the contract period?

**We will negotiate resource scaling and pricing with respondents after they have been selected.**

25. What criteria will be most important to you in evaluating the success of our work on an ongoing basis?

**We will evaluate the work product based on whether it is:**

- **Consistent with the tasks and scope**
- **Delivered on time**
- **Delivered at or under budget**
- **Delivered at the highest quality**

26. Should hourly rates be provided for items like 1.7 Ongoing print and digital design work as needed?

**We are open to various pricing models for ongoing digital design work.**

27. As a part of intake and discovery, may additional activities be proposed outside of what is listed in the RFP (e.g. stakeholder interviews, competitive/comparative research, etc.)?

**Yes – so long as they feed into the tasks described in the RFP.**

28. Are there specific UX/UI research and testing methodologies (e.g. usability testing, tree testing, card sorting, etc.) that should be estimated? Or are recommendations required as a part of the proposal?

**We would like to see specific recommendations from proposers.**

29. Regarding audience work, we typically see this paired with a brand strategy or messaging component. Would you like these included in the scope? If not, we can always adjust the proposal later to reflect your preferences, but it might be good for you to see the value since we won't get to review it before submission.

**We have already laid groundwork on messaging and audiences. For this RFP, we are looking for strong thought partners to build on our existing vision for audiences, brand and messaging.**

30. The proposal contents section mentions a 1–2 page project plan. Our proposals are quite detailed and include many of the requested sections in the RFP, but not necessarily in the order shown. Would it be acceptable to present them in the order and format we see the most easily digestible/linear?

**The order of proposal contents is flexible but must still meet the requirements of the RFP.**