

Chesapeake Bay Trust

Website Redesign RFP – Questions & Answers

BUDGET

1. Do you have a target budget or range for the redesign?
We do not have a budget to publicly share. We are interested in what design and development agencies suggest as the cost to best redesign our site and leverage this communications platform.
2. Given the \$250,000 small-procurement cap referenced in Section 7.8, is that figure inclusive of Phase 6 (Warranty and Ongoing Support), or does the Bay Trust anticipate contracting ongoing maintenance and support separately, as Section III appears to suggest?
We expect a standard warranty period after website launch (30-90 days) that is part of the redesign. Following project completion, we will also consider a separate retainer for ongoing support / development needs to maintain the new website moving forward.
3. Scope changes against the contract ceiling. Section IV states that the Bay Trust reserves the right to add or remove items from the base bid proposal during the contract and to modify or adjust scope of work and payment as needed. Section 7.8.A sets the contract value at no more than the small procurement threshold, currently \$250,000. Could you confirm whether scope added during the contract term would be handled as a separate amendment against that ceiling, or whether such additions are expected to fit within the original amount?
It depends on the scope added but if it's a substantial addition, it would be a separate amendment against the ceiling (so not expected to fit in the original amount).
4. Is there a target or not-to-exceed budget range for this engagement? Additionally, will payments be milestone-based or on a recurring schedule (e.g., monthly)?
Deliverables-based payments. Vendors should propose a budget based on best practice to achieve the redesign.
5. Will the Chesapeake Bay Trust provide a budget template for the deliverables-based pricing, or may Offerors submit their own pricing format as long as it aligns with the required deliverables and timeline?
See section 5.5 Proposal Format. A budget template starts on page 10 of the RFP.
6. Since the contract is deliverables-based, does the Chesapeake Bay Trust expect pricing to be organized by the six project phases (Discovery, Design, Development, Testing, Launch & Training, Warranty), by individual deliverables within each phase, or as a single fixed price with a deliverables breakdown?

Both are acceptable but we prefer individual deliverables within each phase.

7. Section 5.5(h) – Please confirm that the offeror is to provide a proposed cost by Deliverable that is representative of a firm fixed price for each, that would include labor as well as travel and expenses.
Yes, the offeror should provide a proposed cost for each deliverable that would include labor as well as travel and expenses.
8. The RFP states, "Price. Rate devoted to the project to achieve the deliverables." Does the Trust expect Offerors to provide labor categories and hourly rates in addition to fixed prices for each deliverable, or is fixed-price deliverable pricing sufficient?
Fixed-price deliverable is sufficient.
9. Should content migration be priced as a separate deliverable, or should it be included within the website development and implementation costs?
Content migration should be a dedicated line item in the proposal to understand costs and range. Vendor should include metrics in their proposal (i.e. # of pages, hours, etc.)
10. Should anticipated third-party software, plugins, licenses, hosting, and annual subscription fees be included in the proposed project price, or should these costs be identified separately as pass-through or optional expenses?
These items should be articulated separately in the proposal.
11. We understand that this RFP falls under your small procurement threshold category. To help us appropriately shape the scope and level of effort, could you please provide guidance on your anticipated annual budget for ongoing support and maintenance?
Offerors should propose options for additional ongoing support.
12. Is the \$250,000 ceiling inclusive of all third-party software, licenses, hosting and subscription costs?
Yes

TIMELINE

13. What's driving the timing of this redesign project? Any specific pain points with the current platform or vendor?
April 2027 is the desired launch date for strategic messaging and to meet deadlines for compliance and accessibility. Our current website is out of compliance and outdated. We seek a modern, compelling website that enhances user experience and meets compliance requirements.
14. The RFP mentions an estimated 8-month project timeline with a goal to launch in April 2027, while also stating all deliverables must be complete by June 30, 2027. Is April 2027 the desired public launch date?

Yes, April is the desired launch date to meet deadlines for compliance and strategic messaging. However, our fiscal year ends June 30, 2027. June 30th is the final deadline to complete the project.

15. Section 3.1 - If award occurs substantially after September 2026, the 8-month timeline and goal April 2027 launch would become compressed. Would CBT consider revising the launch date?

Yes. April 2027 is our goal for compliance requirements and strategic messaging. However, our fiscal year ends June 30th. All deliverables must be complete by this date.

16. Would it be possible to consider a 1–2 week extension to the proposal submission deadline?

No, there are no extensions for the proposal submission deadline.

17. Is there a projected contract award date and anticipated start date?

We will notify vendors by September 1st. The goal is to begin the project as soon as possible to meet our desired April 2027 launch.

18. Section III states that all deliverables must be complete no later than June 30, 2027, and identifies the warranty period as Deliverable F. Does the Trust expect the warranty period to have commenced by that date, or to have expired by that date?

The warranty period should be complete by June 30, 2027.

CURRENT CMS AND PAGE BUILDER

19. The site appears to run both WPBakery and Elementor. Are they both actually being used, and is there a preference for which the redesigned site standardizes on?

WPBakery is currently used. Elementor was added after the initial build and does not integrate well with the current platform. We seek one user-friendly builder for staff to easily and effectively maintain the new website.

20. Are there specific WordPress builders, hosting environments, plugin types, or governance constraints you prefer or want to avoid?

We want the website to be secure and easy to maintain. We are looking for suggestions on flexible builders and environments that allow us to manage a high quality, visually compelling and user-friendly site.

21. What are the most time-consuming website maintenance tasks today?

We frequently update our website given the variety of grant programs. Our current site is clunky and does not have a lot of flexibility for design. Most edits on our current website take a long time.

22. Which of these different types of content are structured content types on the back end with specific fields?

- a. grant opportunities
- b. staff contact
- c. publications
- d. news
- e. forms
- f. events
- g. funded project
- h. reports

None of these are structured content blocks. We add them either using code (for forms for example) or a combination of photos/text boxes.

23. Regarding the CMS preference in Section III (Phase 3): is the preference for WordPress driven primarily by staff familiarity with that platform, or by the underlying priorities of ease of maintenance and low ongoing cost regardless of platform? Relatedly, does current Bay Trust staff or IT support have experience with any other CMS platform? WordPress is our current platform and where there is staff experience. The Trust will consider platforms other than WordPress as long as the platform is secure, leverages best practices for web design and includes a user-friendly builder so staff can easily maintain the website.

24. Will the Trust consider CMS platforms other than WordPress, such as Drupal?
Yes, the Trust will consider platforms other than WordPress.

25. Will the Chesapeake Bay Trust consider Drupal as the content management system for the redesigned website, given that Drupal is an open-source platform with no licensing or recurring CMS fees, provides enterprise-grade security supported by a dedicated global security team, offers structured content modeling and flexible editorial workflows suitable for non-technical staff, supports scalable integrations with grant management systems, donation platforms, ArcGIS mapping tools, and other third-party services, and is widely adopted by nonprofit and government organizations for secure, high-performance, accessibility-compliant websites?
See response to #24

26. If alternative CMS platforms are acceptable, are there any restrictions or required modules or plugins?
No unified design documentation currently exists. We seek a third-party partner to help rearchitect the site in the needs analysis.

27. Can you tell us how the website goals in Section 2.4 were developed? Should the selected vendor plan to validate or refine them during the first phase?
We wrote the website goals with our understanding on areas for improvement. We can work with the selected Offeror to validate and refine them during the first phase.

28. The current site appears to be built on WPBakery Page Builder. Does the Trust expect a full rebuild off the legacy page builder?
The Offeror should include a recommendation for page builder. We want a user-friendly page builder that allows easy and effective maintenance of the website.
29. To help us accurately estimate migration effort and long-term maintainability, we'd appreciate additional information regarding the Trust's content management approach. Is the Trust committed to continuing to use WPBakery and the Salient theme, or is it open to migrating to a different page-building framework?
Open to another page-builder. Vendor should include a recommendation.
30. When the RFP refers to a "flexible page builder for staff," does the Trust envision full drag-and-drop editing capabilities, or would a structured library of reusable templates and components, with the ability for staff to add and edit text and images, satisfy this requirement?
The vendor should include a recommendation for a builder that is user friendly.
31. It appears the current site is using Elementor. The RFP states an easy to use page builder. Would it be acceptable to build a hybrid Gutenberg (native) block site which is not dependent on a plugin (as a potential scenario)
Yes

CONTENT MIGRATION

32. Roughly how many pages, PDFs, and documents need to migrate?
There are approximately 285 pages and over 8,000 files in our media library. We are looking for a vendor to help us with our assessment and make a recommendation for what should be migrated over. Not every page and file needs to be included in the migration.
33. Approximately how many posts, news articles, events, grant-program pages and other dynamic content records exist?
See above.
34. Approximately how many PDFs/documents/media assets are currently hosted?
See above.
35. Migration approach. The Content Migration Requirements (p. 6) ask the selected firm to identify outdated or duplicate content, and the Information Architecture deliverables (p. 4) ask for recommendations on consolidating, archiving, or removing outdated content. Does the Bay Trust expect all remaining content to carry over as it stands today, or a selective migration in which some content is retired on the basis of those recommendations?

A selective migration that would improve user journeys and experience. We don't think everything needs to be migrated over. Only active and relevant information for our audiences.

36. Content readiness. The Scope of Work covers a content audit, content inventory, and organizational recommendations, but does not state who produces final copy. Will the Bay Trust provide final copy, images, and documents ready for placement in the new templates, or does the Scope of Work expect the selected firm to write, rewrite, or edit content as part of the redesign?

The Bay Trust will provide final copy and media assets.

37. Will the Trust identify content to migrate, archive, or remove, or is the vendor responsible for the content audit?

We are looking for a vendor to help us with our assessment and make a recommendation for what should be migrated over. Not every page and file needs to be included in the migration.

38. Will the vendor receive access to the existing CMS backend and databases?

The awarded vendor will receive access after project initiation.

39. Will the vendor migrate all content, or will Trust staff assist with portions of the migration?

The vendor will be responsible for migrating the majority of content but there can be some places for shared migration efforts. The vendor should make recommendations for the migration process.

40. Should legacy URL redirects be included to preserve SEO value?

Yes

41. Our review identifies approximately 1,005 PDF documents totaling roughly 10,000 pages. Does the requirement for accessible downloadable documents extend to remediating this existing library, or does it apply to documents produced going forward? If existing documents are in scope, would the Trust consider a currency-based approach, with full remediation of recent documents and older material archived or remediated on request? It applies to documents produced going forward.

42. Our review identifies approximately 400 live pages, of which roughly 340 are editorial content rather than automatically generated archive pages. Does the Trust anticipate migrating all existing content, or is significant consolidation and archiving welcome as part of the recommendations described in Section III?

Significant consolidation and archiving are welcome. We are looking for a vendor to help us with our assessment and make a recommendation for what should be migrated over. Not every page and file needs to be included in the migration.

43. Two areas of the site require authentication and could not be reviewed. Can the Trust describe what these contain, whether they are in scope, and whether review access can be provided to Offerors before the closing date?

The awarded Offeror will receive access to the CMS backend after project initiation.

44. The RFP asks bidders to define the division of content migration responsibilities between the selected vendor and Trust staff. To help bidders recommend a realistic division of labor and project schedule, what internal staff resources do you expect to make available for content-related work during the project, such as decisions about content to retain, consolidate, archive, or remove; rewriting or restructuring content where needed; manual entry or reformatting; and content review and approval?

We will have web team of about 3-5 staff members who will be supporting this project.

45. The RFP identifies “accessible downloadable documents where applicable” as an accessibility consideration. Can bidders assume that the Trust is responsible for providing accessible PDFs and other downloadable files, and that the selected vendor’s responsibility will be to design and build an accessible interface for identifying and linking to those files?

Yes

46. Is writing or rewriting website copy within the vendor’s scope, or will the Bay Trust supply final content for migration?

Bay Trust will supply final content.

47. Can CBT provide a complete content inventory/export during discovery?

The selected Offeror will gain access to our current website upon project initiation.

48. Who will be responsible for deciding whether content is retained, rewritten, consolidated, archived or deleted?

We are looking for a vendor to help us with our assessment and make a recommendation for what should be migrated over. The Bay Trust will make final decisions.

49. Will the selected vendor perform content entry in preparation for the initial site build, or should responsibilities be divided between the vendor and Trust staff?

Vendor should include a recommendation for content migration in the proposal.

50. Can you elaborate on your POV regarding level of lift for this - is this a total rebuild from the ground up activity or a refresh? Do you anticipate and desire to throw out more than 75% of the current copy/messaging, or do you want to keep most of it and just update the language? (or are you looking for a recommendation upon evaluation)

We are looking for a recommendation but anticipate this more of a refresh on a modern website that meets requirements for code, improves navigation and user experience, and is more visually appealing.

INTEGRATIONS (MAPS, FORMS, ETC)

51. Are updates to the ArcGIS maps in scope, or will the Trust be managing any updates there? For example, configuring the Impact map's mobile layout.

The Bay Trust will continue to manage the ArcGIS maps. We need to still be able to embed the ArcGIS maps on the new website.

52. Section 3.1 - The RFP lists interactive maps (currently powered by ArcGIS) as part of the Phase 3 scope. Is the expectation that we re-embed the existing ArcGIS maps as-is into the new site, or does the Trust want the maps redesigned to match the new site's visual design and user experience?

Re-embed existing maps. We need the redesign to still have the capability to embed ArcGIS maps.

53. ArcGIS maps. Phase 3 lists interactive maps and notes that current maps are powered by ArcGIS (p. 5). Could you describe the current implementation in more detail, in particular whether it is an embedded map such as an ArcGIS Online public map embed, or whether it uses custom data layers, live data feeds, or API-level integration with other Bay Trust systems?

We use ArcGIS to share all our awarded projects. We need to be able to embed ArcGIS maps into the new website. Here is an example of an embedded map:

<https://cbtrust.org/impact-of-our-work/>

54. Is the current ArcGIS-powered mapping implementation something Bay Trust staff manage independently, or is it a vendor-supported service the redesigned website would need to integrate with?

Bay Trust staff will continue to manage the ArcGIS maps. We need to still be able to embed the ArcGIS maps on the new website.

55. What is the Trust's goal for an enhanced map experience? Would you be open to keeping the current maps as-is at launch and enhancing them in a later phase?

Yes, keep the current maps.

56. Regarding the ArcGIS maps: is the vendor's scope to embed and style existing map applications, or to build or restructure the map applications themselves? Some maps appear to be maintained by partner agencies, could you confirm who maintains each, and whether the Bay Trust holds its own ArcGIS Online licensing?

Embed existing maps. Bay Trust will continue to manage/update the maps.

57. Will CBT provide ArcGIS configuration/API documentation and access to the existing map implementations?

Yes

58. Are donations, Bay Plate interest, newsletter signups, event registrations, and grant-related actions currently tracked in analytics?
They are not. We use their form platforms.
59. Section 2.4 - Is grant application intake currently managed through a third-party grant management system? If so, does the redesign need to integrate with that system directly, or simply link out to it from the website?
Yes, the grant management system is managed through a third-party platform. The new website will simply link out to it from the website.
60. What system are you using for email marketing?
MailChimp.
61. Section 3.1 - Are there existing email marketing (e.g., Mailchimp, Constant Contact) or CRM integrations that the new site needs to support for newsletter signups?
We use MailChimp and do need people to be able to sign up through the website. Currently we embed forms from MailChimp to accomplish this. We are happy to continue to use this practice.
62. Email marketing. The Scope of Work lists newsletter signups (p. 5) and the Technical Environment section asks about experience with email marketing platforms. Which platform does the Bay Trust use, or is the choice open? And what depth of integration is expected: a signup form that passes subscribers to the platform, synchronization of audience segments, or two-way data exchange?
We use MailChimp and embed sign up forms created through MailChimp. We do need people to be able to sign up from our website but can keep using MailChimp as long as the forms are easy to access/use on the new site. Here is a webpage with that example: <https://cbtrust.org/newsletters/>
63. Are there any existing third-party licenses, plugins, or subscriptions that must be retained? How much are you currently paying in annual fees for 3rd party tools, plugins, licenses, subscriptions, etc?
No unified design documentation currently exists. We seek a third-party partner to help rearchitect the site in the needs analysis. We are open to best practices for a modern website.
64. What does the organization's tech stack look like? (EX: Online donation platform, grant management system, email marketing, CRM, etc.)
Our current website is hosted on Wordpress. We use SmartSimple for our grant awards portal. Our donation forms are through Funraise and integrate with Raiser's Edge, our CRM. Email marketing is through MailChimp.
65. Which email marketing provider, donation platform, and grant management system does the Trust use today, and are they expected to carry over? Are any of them changing

during the project window?

Mailchimp, Funraise and SmartSimple. They will all remain. MailChimp and Funraise forms are embedded on the website and SmartSimple is linked.

66. Can you provide any additional information about the type of content that is hosted within the portal here - [Grants Portal Login - Chesapeake Bay Trust](#) ?

That is a landing page for current grantees and prospective applicants to easily access our grantmaking portal through SmartSimple. We transitioned to SmartSimple this summer so thought an easy to remember url on our website would help applicants find and access the new portal.

67. Grant management. Applicants are currently sent to the Bay Trust's SmartSimple portal. Should the redesigned site keep linking out to that portal as it does today, or does the Bay Trust want a closer connection, for example single sign-on or open funding opportunities pulled onto the site automatically?

The redesign can keep linking to the Grants Portal.

68. Can you provide more detail on your goal to “improve the grant application experience”? Does this refer primarily to improving website pathways and supporting content that direct users to the external application system, or do you expect changes or integrations involving the grant-management platform itself?

We will continue to link to our Grants Portal (hosted through SmartSimple). The new website should improve the architecture and navigation so interested applicants can more easily find the programs they are eligible for. In addition, improved grant page templates should ensure information is more accessible and easier to understand.

69. Section 2.4 identifies improving the grant application experience as a goal. Which system does the Trust currently use for grant applications and reporting, and is integration with or styling of that system within scope?

We use SmartSimple for our Grants Portal. We will continue to link to this system. The new website should improve the architecture and user experience so potential applicants can more easily find grant opportunities they are eligible for.

70. Section 3.1, Phase 3 - How many forms are required? Do forms collect sensitive personal or payment information?

We use a third party to embed forms. We need a site that continues to embed these forms. Donation forms collect sensitive information like payment information.

71. Section 3.1 - What donation processing platform is currently in use? And is there an expectation to retain it as part of the redesign? Or if this changing into a new platform? We currently use Funraise. We will keep using this platform so need to be able to embed this code on the new site. Here is a webpage with a donation form as an example:

<https://cbtrust.org/make-a-gift/>

72. Online donations. The current donate pages use Blackbaud Merchant Services and already offer monthly giving. Does the Bay Trust plan to stay with that processor for the new site? And should the redesigned donation pages keep handing off to the processor's own pages as they do today, or would you prefer the giving flow to run on the site itself? The Bay Trust will continue to use a third-party platform for donations. We currently use Funraise. The new website needs to be able to host this code. Here is an example of a webpage with a donation form: <https://cbtrust.org/make-a-gift/>
73. Is the Bay Trust's current online donation platform expected to remain in place, and are any changes to the donation or CRM platforms anticipated during the project window? Yes, we will continue to use Funraise. Funraise forms need to be able to be embedded on the new site.
74. Can the Trust provide documentation on current integrations, APIs, forms, donation systems, or data sources? The Trust currently embeds code from MailChimp, Funraise, and ArcGIS on the website. We link to SmartSimple and BambooHR.
75. Which online donation platform and which email marketing platform does the Trust currently use, and are both expected to be carried forward? Funraise and Mailchimp. We embed forms from these platforms. We need to still be able to embed forms from Funraise and Mailchimp on the new website.
76. Several areas of the site appear to run on structured data, including the grant Program Navigator, the Impact Map, and grant program listings. What systems or datasets drive these, and are they expected to carry over? Should existing categories, tags, or filtering logic be preserved, and is there documentation? Yes, the Program Navigator and ArcGIS maps should still be able to be embedded on the new website.
77. Are any parts of the site being evaluated or reworked in parallel or ahead of kickoff, such as the blog, which appears inactive? Or will the project inherit everything as-is? Project will inherit everything as is.
78. How well documented are your content processes today: the content lifecycle (intake, creation, delivery, maintenance), tools, owners, and performance standards? If new content is recommended, would the Trust want content creation processes defined as part of this work? The Offeror should make recommendations. We do not have documented content processes today.
79. What activities, deliverables, and level of fidelity does the Trust expect for the blog concept noted in the RFP? We want a blog that is visually appealing, easy to update, and automatically populates

on our homepage for easy access to articles.

80. Can you describe any requirements for the “Advanced search” required in the scope?
We need to improve user experience and how audiences find the information they are looking for. Our current website does not have a search function. The Offeror should provide recommendations for advanced search based on best practice.

81. Are there preferred technologies for advanced search such as ElasticSearch or Algolia?
Vendor should include recommended solution(s) in proposal.

82. The RFP asks that users be able to find publications, reports, and forms. Should site search return matches from inside document contents, or from titles and metadata only?
Offeror should include a recommendation for site search.

83. Considering "advance search" option, Does CBT expect keyword search only, or relevance-ranked/faceted search?
The Offeror should provide recommendations.

84. What form platforms and form types must the redesigned website support? Do you expect third-party forms to be linked or embedded, native forms to be created within the CMS, or both? Are any forms expected to involve payments, system integrations, or sensitive information?
We embed forms from Funraise and Mailchimp at this time. We need to be able to continue embedding these forms on the new site.

85. Can you describe what is meant by “social media integration?” Do you mean links to your social channels? Or social media embeds within the website?
We are open to suggestions but linking to social media would be acceptable.

86. The RFP states that “the redesigned website must integrate with or accommodate the Bay Trust's existing technology ecosystem.” Can you provide more detail on what integrations and accommodations are needed?
We want to make sure the website works with our forms and maps.

87. The site currently links to more than one grant application system. Which will be the system of record at launch, and what level of integration is expected; links only, a maintained list of open opportunities in the CMS, an automated feed from the grants system, or single sign-on?
SmartSimple; links only

88. Some grant opportunity information appears to be maintained outside the website. Should that content move into the new site’s CMS so it is searchable and filterable there,

or continue to live in its current system?

Current system

89. Does the redesign scope include any work on the shop, which lives on a separate domain? Even light visual alignment?

No

90. Is the Bay Trust's separate online store in scope for this project (for navigation, branding alignment, or consolidation) or does it remain independent?

Remain independent.

91. Should the separate Shopify store at shopchesapeakebaytrust.org remain an external property linked from the redesigned website, or should any Shopify theme alignment, accessibility review, analytics configuration, integration, or ongoing support be included within the scope of work?

Yes, remain an external link.

92. Are there specific legacy systems, grant management platforms, or CRM databases that must be integrated into the new website?

We currently link to our grant management portal and embed content from Funraise, Mailchimp, ArcGIS, vimeo and youtube.

93. What third-party tools, plugins, or platforms must be integrated?

See above

94. Which form platform or platforms are currently in use, approximately how many forms exist, and which are considered mission-critical?

Forms are embedded from Funraise and Mailchimp. There are only a handful of pages with forms.

95. Which forms include conditional logic, multi-step workflows, file uploads, payment processing, or third-party integrations?

Funraise and Mailchimp.

96. To better understand the scope of the grant-related work described in the RFP, we'd appreciate clarification regarding the current content architecture. Are grant opportunities stored as standard WordPress pages, custom post types, or another structured content type?

Wordpress pages

97. Are custom fields currently used for grant content and, if so, is Advanced Custom Fields (ACF) or another framework in place?

No custom fields.

98. Which search and filtering capabilities are considered essential for staff and site visitors?
Vendor should include recommendations based on best practice.
99. What other functionality do you feel needs to be reviewed, improved or enhanced beyond search functionality as mentioned?
Our navigation needs to be improved so users can more easily find the information they are seeking.

ACCESSIBILITY AND COMPLIANCE

100. Will your subscription to the accessibility widget continue post-launch?
The vendor should provide recommendations on how to ensure the site continues to meet accessibility requirements moving forward. We are open to suggestions on how to achieve this.
101. Is the Trust looking for a natively conformant WCAG 2.1 AA build or does the accessibility widget accomplish your accessibility goals?
The accessibility widget does not accomplish our accessibility goals. Our current website code is not compliant. We need a website that meets WCAG 2.1 AA requirements.
102. It appears as though you are currently using Accessibe – how is that meeting, or not meeting, your desired goals for accessibility?
It's not meeting our goals. Our current website is out of compliance. We need updated code and improved user experience.
103. Accessibility baseline. The Accessibility Compliance Requirements (p. 6) set WCAG 2.1 Level AA as the standard for the new site. Has the current site been audited for accessibility, and if so, could the Bay Trust share that report? Knowing the existing gaps would help us plan the remediation work.
Our current site does not meet compliance requirements. We need a redesign with code that does meet accessibility requirements.
104. How are you documenting ADA Title II compliance on your website(s) now?
We are working with our current host and partners to do scans. We are aware that our current website does not meet compliance requirements.
105. Do you have internal WCAG compliance expertise, or do you need external guidance?
No, we do not have internal compliance expertise. We will likely employ an external consultant and/or auditor for final compliance review.
106. How often do you update the accessibility statement on your website?
We update the statement when there are changes to publish.

107. When was the last time you conducted a manual, site-wide content audit for WCAG compliance on your website content? (including embedded content, PDFs, timed media, etc.)
We have not conducted a site-wide content audit. We are aware that the code is not compliant and that content will need to be updated when launching a new website.
108. Do you have an accessibility overlay tool in use on the website?
We currently have an accessibility overlay tool on our website, but we know this does not meet compliance requirements. The redesign must meet compliance requirements.
109. Are there any accessibility requirements beyond WCAG 2.1 AA?
What is outlined in the RFP is what is required by the American with Disabilities Act. If there are further changes to ADA requirements, those will need to be incorporated with this project.
110. Should accessibility testing include both automated and manual screen-reader testing?
Yes
111. Is a third-party accessibility audit required before launch?
Yes
112. Is there any existing accessibility documentation, such as a prior audit, a VPAT, or automated scan results? This would establish a baseline for the “improved accessibility compliance scores” success metric in the RFP. If this is not available, is there interest in conducting a baseline accessibility assessment of the current site?
Our current website code does not meet compliance requirements. The new website must meet requirements for WCAG 2.1 AA. Vendor should propose recommendations on how to accomplish this and if a baseline assessment is needed.
113. The RFP specifies WCAG 2.1 AA. Would the Trust consider WCAG 2.2 AA as the target instead? It is the current published standard, it fully includes 2.1 AA, and it adds a small set of newer criteria.
Yes
114. The RFP notes that accessibility requirements extend to downloadable documents. Does the scope include remediating the Bay Trust’s existing library of PDFs and Office documents for accessibility, or does that requirement apply to documents created going forward? If existing documents are in scope, approximately how many are expected to carry over to the new site?
Documents created going forward.

115. Are PDFs and other downloadable documents expected to be full-text searchable?
Yes
116. Should accessibility remediation be limited to newly created content and templates, or should existing downloadable documents also be included within the scope of work?
New content and templates.
117. Is formal third-party accessibility certification required, or will the selected vendor's documented automated and manual testing process be sufficient?
We need evidence that the site meets compliance requirements. The vendor should include recommendations on how to accomplish this.

PROPOSAL FORMATTING

118. Does the cover letter count against the five-page cap?
No, the cover letter does not count against the five-page cap.
119. Are there any additional formatting requirements for the RFP? For example, minimum font sizes, changes to margins, etc.
No, we do not have any formatting requirements.
120. Section 5.5 - In order to better prepare an organized response, can offerors include a cover page, cover letter, table of contents, and divider pages, exclusive of the 5-page limit?
Yes, that is acceptable.
121. Section 5.5 - Are references and website examples counted within the 5-page narrative limit? Are cover letter, table of contents, dividers, and confidentiality legend excluded?
Yes, references, website examples, cover letter, table of contents, dividers and confidentiality can be excluded from the 5-page narrative.
122. Section 5.5(h) - May Offerors recreate the budget table in their own format, provided it includes phase, description, delivery date, and proposed cost, or are they required to pull the included table out and complete it as a .pdf?
As long as it includes the same categories, offerors can recreate the table.
123. Section 5.5(h) – Can the Offeror include an accompanying narrative to detail rationale for its budgeted costs? Please confirm a budget narrative will be excluded from the 5-page limit.
Yes, offeror can include an accompanying narrative to explain budget costs.

124. Section 7.9 – Is the Offeror responsible for including a statement certifying that the price information is accurate, complete and correct as part of its response, or is certification deemed made by submitting the proposal?
Certification is deemed by submitting the proposal.
125. Section 7.1 - Does CBT have a preferred method for identification of proprietary information and the associated justifications within the proposal?
If the vendor has proprietary information, they should mark it as such when submitting and include the justification as a footnote or on a separate page.
126. Section 7.3 - Can CBT please provide a sample contract so that offerors can review the terms and conditions prior to submitting a proposal?
For vendors providing services we typically use the vendor's form of contract or the industry standard and we mutually agree upon terms and conditions.
127. To stay within the five-page limit while still providing meaningful detail, would it be acceptable to keep the core response concise and include additional supporting information, including the Current Website Assessment, outside of the page count?
Yes. Offerors can provide supplemental information outside of the page limit.

PEER ORGANIZATIONS

128. Are there peer or aspirational websites the Trust feels are strong examples of nonprofit grantmaking, environmental stewardship, or public-sector usability?
<https://www.cbf.org/>
<https://www.chesapeakebay.net/>
129. Has the Trust identified peer organizations or competitors for donor attention? If so, who are they, and do you have observations on their approaches to donor engagement and impact presentation?
Chesapeake Bay Foundation

BRANDING AND MEDIA ASSETS

130. When were your brand guidelines last updated?
In 2022 the organization adopted a new logo and style guide.
131. Can you share the brand guidelines or a list of what is included in the guidelines?
Does it include messaging guidelines?
It is only colors and the logo. We can share the current style guide.
132. Are you seeking a brand/visual overhaul? Or a lighter brand/visual evolution?

We are not. We are seeking a website that brings to life our brand. The current website does not fully adopt the redesign.

133. Are you willing to explore new brand/online typography/font choices that would push the look and feel to be more modern and professional?
We would be open to fonts but not colors. We should leverage the colors in our style guide.
134. Do you have an image and/or video asset library?
Yes, we collect photos for our annual report and have invested in video the past two years.
135. Brand guidelines. Phase 2 asks for a visual design that reflects the Chesapeake Bay Trust brand (p. 4). Does the Bay Trust have existing brand guidelines, a visual identity or style guide, or logo usage standards that the new site should follow?
We have a style guide with our logo and colors that should be incorporated into the redesign. Overall, we are looking for a more modern, refreshed look for the site that better matches our mission and impact.
136. Will the Trust provide brand guidelines, logos, color palettes, and typography assets?
Yes
137. What is the state of your current brand architecture and messaging architecture? Do you expect deliverables around either as part of this engagement?
We are looking for recommendations on website architecture. We have strong brand elements and messaging that should be included in the website redesign.
138. What brand, messaging, and editorial documentation can you share with the selected vendor? We're thinking of things like brand guidelines, logo files and design assets (color, typography, templates), brand story or values, an editorial style guide, and voice and tone standards. Are there any of these you would like revisited as part of this project?
We can share our style guide and brand elements with the selected Offeror. We are not looking for a rebrand but for our website to match our brand.
139. What are the Trust's strategic priorities and communication goals right now, and is there documentation you can share, such as annual priorities or roadmaps?
We will discuss our brand and goals during the Discovery phase. All documents will be shared with the selected Offeror during project initiation.
140. What does the Trust intend by the "style guide and design system" deliverable? A web style guide for the new site, or a broader component library and design system for

ongoing organizational use?

We want a style guide for our website that includes specific design for headers, sub headers, body text, and other elements so there is consistency across pages.

141. The RFP notes the redesign should maintain the Trust's mission, branding, and communication goals while modernizing. Which brand elements are fixed, and which are open to refinement? We're thinking of the logo, tagline, color, typography, imagery, and iconography.

Our logo, colors and tagline are fixed. We want the new website to better represent our brand with design and imagery.

142. Does the Trust have a brand style guide (logo usage guidance, typefaces, and color palette) that can be shared with prospective bidders?

The style guide will be shared upon project initiation.

BAY TRUST STAFF AND APPROVERS

143. How many staff members will manage the site or load content?

We'll have a web team of about 3 people and then will want a couple other staff on the program side to have limited access to make minimal updates (not design related but easy maintenance like updating links).

144. What does the internal approval process look like? (EX: client team, steering committee, etc.)

We will have a web redesign team led by the Vice President of Communications & Advancement, and the President as the final approvers.

145. Who manages the current website today, in terms of team, roles, and any outside vendors? How do you see that evolving with the new site, including who will handle day-to-day updates and own content creation after launch, and how technical is that group?

The Bay Trust manages the current site and will continue to maintain the site after launch. The web team has graphic design expertise but are not web coders. We seek a user-friendly, easy to maintain website.

146. Who are the primary internal stakeholders who will have final approval authority on major deliverables like the sitemap, wireframes, and design concepts?

Vice President of Communications and Advancement and the President

TRAINING AND STAFF MEETINGS

147. Section 3.1 - Are all meetings and trainings expected to be virtual, or should offerors budget for in-person meetings in Annapolis?

We defer to the offeror but virtual is acceptable.

148. Section 3.1, Phase 5 – For budgeting purposes, how many training sessions are expected, for how many staff, and should they be remote or in person? Are recorded sessions and written manuals both required?
We are interested in what vendors recommend to support ongoing maintenance of the new site. If virtual, the training session can be recorded to limit the number of offerings. A written manual is not required, unless recommended by the vendor.
149. Does the Trust have a preference for a remote or in-person kickoff?
Remote is acceptable.
150. How many staff members will require CMS administrator or editor training?
Should training be delivered onsite, remote, or hybrid?
Training can be virtual and recorded to help with ongoing training of staff. There will be a small web team of about 3-5 people who need access to edit the site.
151. Are video recordings required in addition to written documentation?
Yes, recordings are required to help with future training.

OFFERORS

152. Section 5.5(a), (f); Section 6.4(A) – Will naming personnel create any sort of key personnel obligations? If yes, what are the substitution rules after award?
No, this will not create obligations. The selected offeror can work with the Bay Trust on personnel.
153. Do the current solicitation rules require that you select one vendor for this project? Or, are you able to select two or more partners for this bid?
We will select one vendor, but that vendor can suggest more partners to work with on the project.
154. Is this contract intended for a single vendor or for multiple vendors?
Single vendor.
155. Is there an incumbent for this contract? If so, please provide the incumbent name, current contract number, duration, historical level of effort, and value of the contract.
This information is proprietary and confidential and is not being disclosed.
156. Will the incumbent vendor be eligible to submit a proposal in response to this RFP?
See response to #1

157. What specific expectations does the Trust have regarding the requirement for experience working with individuals of diverse backgrounds, and how should Offerors demonstrate compliance with this preferred qualification?
As stated in the RFP, experience working with individuals of diverse backgrounds is not required but preferred. Please review the Bay Trust's accessibility statement:
<https://cbtrust.org/accessibility-statement/>
158. To help prospective bidders understand the level of interest in this solicitation, can you share the approximate number of vendors who have participated in the Q&A process to date?
Approximately 20.
159. Can you share whether the firm currently responsible for the Trust's website is planning to submit a proposal for this project?
Yes
160. Section 6.4 lists five evaluation factors (Team, Approach, Experience, Capacity, Price). Are relative weights assigned to them?
No weights are assigned.

OFFSHORE RESOURCES

161. Is the agency open to a hybrid delivery model utilizing a combination of onshore and offshore resources?
Anyone authorized to work in the United States is eligible to work on this project.
162. Will the work be performed onsite, remotely, or through a hybrid arrangement?
Remote.
163. Can Permanent Residents (Green Card) and H1 VISA holders work on this project?
Anyone authorized to work in the United States is eligible to work on this project.
164. Is the use of offshore resources permitted for the performance of services under this contract?
Anyone authorized to work in the United States is eligible to work on this project.
165. If offshore resources are permitted, can a portion of the work be performed from outside the United States, such as from India?
See response above

MULTILINGUAL FUNCTIONALITY

166. Section 3.1 - The RFP does not currently mention multi-language support, but the current website has it. Is multi-language functionality a requirement or a nice-to-have for this project? If it is in scope, does the Trust have a preference between a plugin-based machine translation solution or professionally translated content maintained alongside the English site?
It is a nice-to-have for this project. We want our site to be as accessible as possible. We are open to suggestions based on best practice for user experience and ongoing maintenance.
167. Is multilingual support a requirement for the redesigned site? If so, which languages, and is human translation expected or is machine translation acceptable? Multilingual functionality is a nice-to-have for this project. We want our site to be as accessible as possible. We are open to suggestions based on best practice for user experience and ongoing maintenance.
168. What is the expectation around multilingual support? Is Gtranslate supporting your needs?
We are open to best practices for modern websites.
169. Language support. The RFP names nine primary audiences (§2.3). Does the new site need to support any language other than English for any of them, or is English-only content confirmed?
English is primary but we do like having the option for visitors to translate the site.
170. The current website provides automated on-site translation through GTranslate. Is multilingual functionality a requirement for the redesigned site? If so, does the Trust expect to continue using automated translation, and are there particular languages or quality requirements that the solution must support?
Multilingual functionality is not required but preferred. For ongoing management, it needs to be an automated system. The Offeror should provide recommendations based on best practice to accomplish this.

HOSTING

171. Section 3.1 - Is the Trust currently self-hosting or using a managed WordPress host, and is there a preference to retain the existing host or is the Offeror expected to recommend one?
The Offeror should recommend hosting.
172. Do you want the selected firm to provide hosting, or will the site live in your environment?
The selected firm should provide hosting.

173. Who is your hosting provider now?

Mosaic

174. Hosting and content ownership. To plan the migration and the hosting recommendation, could you tell us who hosts the current site today, and whether Bay Trust staff maintain the content directly or an outside vendor does?

Mosaic is our current host and Bay Trust staff maintain the content directly.

175. Should the vendor propose hosting, or does the Trust intend to host the website internally?

The Trust would prefer that the website be hosted by the vendor.

176. If Trust-hosted, should the vendor configure development, UAT, and production environments?

N/A. See response above

177. Can the Trust provide details on the current hosting stack to confirm compatibility?

No unified design documentation currently exists. We seek a third-party partner to help rearchitect the site in the needs analysis.

178. Will the Trust consider Acquia as a hosting platform for the redesigned website? Vendor should make a compelling case for hosting recommendations based upon their proposal (ie. CMS, etc.)

179. Since the RFP requests secure hosting recommendations, should hosting services be included in the pricing proposal, or is Chesapeake Bay Trust planning to procure hosting separately?

Vendor should include recommendations in their proposal.

180. Section 3.1 Phase 3 lists "Secure hosting recommendations," while the Deliverable C budget table lists "secure hosting." Should the proposed budget include the vendor providing and managing hosting, or only recommending a hosting solution the Bay Trust procures and manages directly?

The Offeror should recommend hosting and this should be included in the proposed budget.

181. Does CBT currently host the website internally or through a third-party provider?

Third-party provider

182. Should bidders assume that the current website vendor or other technical partners will be available to support transition activities, including access to hosting, source files, credentials, integrations, and other technical documentation?

Yes

KEY AUDIENCES AND STAKEHOLDER INTERVIEWS

183. Section 3.1 – For budgeting purposes, how many stakeholder interviews or workshops should be assumed? Will the Trust coordinate scheduling and participant availability?
The Trust can coordinate scheduling. We are looking for a vendor to make suggestions for number of interviews based on best practice.
184. Who are the key stakeholder groups, and what do you know today about their goals, needs, and satisfaction?
Please see section 2.3 of the RFP for Primary Audiences. The Discovery Phase will include an overview of their goals and needs.
185. Does “audience analysis” include validating the audience list itself, or is the list considered settled? What resources exist to support the analysis, and do you expect it can be done with those plus desk research and stakeholder interviews?
We believe we have our accurate list of primary audiences. We expect the analysis to be done with research and interviews.
186. Which audiences are the priority for the journey maps, what goals sit behind that deliverable, and how does your team plan to use them? Related, have key tasks already been mapped to the nine primary audiences, and if so, can you share that work?
The goal is to improve user experience for our key audiences. We have not mapped key tasks but can explain our goals for each audience with our website.
187. What user feedback do you have beyond stakeholder feedback? And do you have access to users, such as donors or grantees, that the vendor could reach for lightweight research like a short survey?
Yes, the selected vendor can interview donors or grantees for research. We also completed public polling in the spring and that data can be used to inform the website redesign as appropriate.
188. User testing is not listed in the RFP. Is the Trust open to including it? There are lower cost approaches that work well if budget is a constraint.
The Offeror should provide recommendations in the proposal.
189. Are there existing audience insights, research, or strategies that will be available for review as part of Discovery?
Yes. We recently completed some public polling and that data can be shared to inform our redesign.

190. Approximately how many stakeholders or stakeholder groups should we anticipate including in interviews?
The Offeror should include recommendations in the proposal.
191. Has the Trust conducted any preliminary research, analytics review, audience analysis, stakeholder interviews, or other discovery in preparation for this project? If so, can those findings be shared with prospective bidders or, alternatively, with the selected firm at kickoff?
No preliminary research or data review has been conducted.
192. Can you provide additional detail about the anticipated number and format of stakeholder interviews or other discovery activities, such as one-on-one interviews, group workshops, or surveys?
The Offeror should recommend the number and format in the proposal.
193. The RFP identifies nine primary audiences and requires “user journey maps for priority audiences.” Among these, which are the most important audiences, and how many user journeys should bidders include in their scope?
The Offeror should include recommendations in the proposal. Some audiences may have overlapping journeys. The Bay Trust will work with the selected Offeror on audience analysis.
194. What level of stakeholder and user research should bidders assume for pricing purposes—for example, internal stakeholder interviews only, a combination of stakeholder and external-user interviews, surveys, usability testing, or other research methods?
The Offeror should propose recommendations and options.

WARRANTY

195. Section 3.1, Phase 6 and Section 5.5(h), Deliverable F - What warranty duration does the Trust expect? Should optional ongoing maintenance/support be included in the evaluated base price?
We expect a 30-90 day standard warranty after website launch. We will also consider an additional ongoing retainer for support / development needs to maintain the new website moving forward.
196. Section 3.1, Phase 6 - Can the Trust confirm that warranty excludes issues caused by third-party platforms, hosting outages, plugin changes, staff edits, new feature requests, content updates, malware, or integrations outside contractor control?
Yes, it excludes any issues outside of contractor control. We are interested in hosting provided by the contractor, so hosting issues may be part of the warranty.
197. What response times are required for critical versus non-critical support issues?

Vendor should propose availability and options

198. Is 24x7 support required during the warranty period?

Vendor should propose availability and options.

199. Should the required warranty period be included in the fixed project price, or should Offerors identify the warranty effort and associated value separately?

Warranty should be included in the fixed project price.

200. Should optional post-launch support and maintenance services be priced separately from the implementation project, including hourly rates for future enhancements, or should they be included in the base proposal?

Optional post-launch support can have separate agreements.

DESIGN CONCEPTS

201. Section 3.1, Phase 2 – For budgeting purposes, how many design concepts and revision rounds are expected for homepage, interior templates, grant pages, donation pages, Bay Plate pages, blog, news, and resource pages?

Vendor should include recommendations/options in the proposal. Ideally, we would align on goals during the initial discovery phases to inform design concepts.

202. How many page templates require full design mockups?

We are interested in design concepts for our homepage, interior templates, grant pages, donation pages, Bay Plate pages, and a blog.

INSURANCE

203. Section 5.6 – Can the Trust confirm what minimum insurance limits are considered “usual and customary”?

The vendor is required to maintain insurance coverage with limits of at least \$1 million per occurrence and \$2 million in the aggregate, including:

- Commercial General Liability
- Technology Errors & Omissions (Tech E&O), including Media Liability
- Cyber Liability

If the vendor or its employees will be working on-site at our physical location, the vendor should also provide proof of Commercial Auto Liability and Workers' Compensation coverage.

The vendor should maintain the required insurance for an appropriate period following completion of the work, as applicable.

204. Are background checks required for vendor personnel?

No

205. Must all data, metadata, and code be exportable in non-proprietary formats? Standard data and metadata should be. Vendor should propose guidance on any items that might be proprietary content.

SECURITY

206. Are there specific security standards or compliance frameworks the vendor must meet?
Standard levels of security should be implemented - including implementation of SSL/TLS, secure user credentialing with MFA support, and sensitive data (ex credentials) should be secured at transit and rest; implemented code and any third-party tools should be evaluated for active development/maintenance/security; WCAG 2.1 AA.
207. Will the Trust run vulnerability scans, or must the vendor conduct scans prior to review?
Vendor should take lead on implementation and ongoing security monitoring guidance in their proposal.
208. If vulnerabilities are found, will the Trust provide remediation guidance?
Vendor should take lead on ongoing security monitoring / guidance.

PERFORMANCE TARGETS

209. Performance target. Phase 3 asks for optimized performance and page speed (p. 5). Does the Bay Trust have a specific benchmark in mind, for example Core Web Vitals thresholds or a page-load time, or should we propose targets and test against current best practice?
We are looking for a vendor to propose targets understanding best practice.
210. What website performance KPIs are established, if any, and how are they evaluated today? Can you share analytics access or reporting? We're particularly interested in the desktop/tablet/mobile split, whether any priority audiences skew toward one device, and overall traffic volume (sessions per month, peak periods), which informs hosting recommendations. Relatedly, does the Trust have defined strategic priorities that supporting performance metrics should tie to, and is documentation available to share?
We currently do not have website performance KPIs. The selected Offeror will have access to our CMS data upon project initiation.
211. Has the Trust done a user experience assessment before? If so, when was it last

conducted and is it based on the current site experience? What criteria were used, and is it available to share?

No, we have not completed a user experience assessment.

212. What measurement of success metrics and related optimization recommendations should be included within the ongoing support agreement?
Offerors should suggest recommendations based on best practice.

213. How soon after launch would the Bay Trust like the first performance assessment to occur? We typically recommend allowing approximately 60–90 days to establish meaningful post-launch performance data.
Offerors should propose recommendations based on best practice.

214. Beyond the metrics listed as potential KPIs, are there specific conversion events or user goals that are currently underperforming and should be a top priority for the design and UX strategy?
The selected Offeror will gain access to the CMS and data upon project initiation to make recommendations.

SYSTEM/ FILE STORAGE

215. What tools does the Trust use for collaboration (Google Workspace, Figma, Dropbox, Slack, etc.)? Are there systems vendors are required to use for file storage, documents, messaging, or scheduling?
Microsoft Outlook. No required systems.