dfree®

RFP

Website Usability & Design Refresh:
User Experience (UX), User Interface (UI),
Customer Experience (CX) Design,
SEO Strategy & Management Services

04/03/20

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PROJECT OVERVIEW

Growth Hack Strategist (GHS) is currently accepting RFP responses, on behalf of client, **dfree® Global Foundation, Inc.**, who's seeking a partner with website development, website design and SEO strategic capabilities. The ideal partner will:

- Develop and Design the EDU website hub / online destination,
- Redesign the main landing page (homepage) at www.mydfree.org and
- Develop the SEO strategy and Implement SEO for the new EDU website hub

BACKGROUND

Client / Stakeholder: dfree® Global Foundation Inc., nonprofit organization

dfree® is a financial freedom movement that addresses the cultural, psychological and spiritual influences on financial wellness and offers practical strategies for achieving financial success. (Please visit: https://mydfree.org/about-us/ for more details)

MISSION
dfree® is a transformational, lifestyle movement that promotes financial freedom through values-based principles and practical approaches to financial management.

VISION
dfree® will be a leader in the creation of an economic and cultural shift that increases consumer participation in savings, insurance and investments.

AUDIENCE
dfree®'s website visitors represent three broad categories, first: 1) individual users, 2) organizations / group leaders and their members, and 3) corporate users. From these categories, the visitors are segmented as follows:

Individual Users	Organizations / Groups	Corporate Users
-Millennials / Gen Y	- Churches / Faith-based organizations	- Sponsors
- Gen X	- Social / Civic groups	- Partners
- Boomers		

WEBSITE VISITORS

Demographics	Gender	Age	Devices
42% of visitors	Female – 63%	42% of visitors	Desktop – 66%
	Male – 37%	25 – 34 (21%)	Mobile – 31%
		45 – 54 (21%)	Tablet – 3%

PROJECT GOALS

PURPOSE
The purpose of the Request for Proposal (RFP) is to identify the appropriate partner to improve the user experience of mydfree.org for members and prospects, ultimately leading to a refresh of the site design.

The current site is not fully responsive and user-friendly with multiple tiers of navigation, posing a challenge to navigate, the user experience does not align well with our target audiences, 3rd party services are not integrated well, and the site templates do not provide for a rich and intuitive content experience.

The client works to generate increased awareness of the organization and deliver value. The client needs a partner to help them share the "dfree® Movement" with new audiences, develop a platform for better storytelling, and ensure visitors to the site can quickly and effectively meet their goals / needs.

The area, "dfree Academy," located at https://mydfree.org/get-control/dfree-academy/, on the current site requires an overhaul / site refresh to become a robust EDU Learning Center, ultimately serving as the destination to:
- Find tools and strategies on dfree® programs.
- Find curriculums to support individuals or groups in learning
- Share tips and tactics regarding finance.
- After the redesign, this area will:
- Encapsulate "get started, get control and young money"

The goal of the new design is to create a destination that optimizes the user experience with ease of understanding, and user interface (navigation and search). The new destination will also direct visitors to "dfree Media" and "dfree Events."

GOALS
- Improve UX and UI for a well-thought-out user journey with convenience and speed.
- Provide an immersive experience according to the evaluation from the desired visitors.
- Begin the collection of valuable visitor data and usability testing to drive the next iteration of the site.
- Identify easy opportunities to improve the current site including making the current site more mobile-friendly and responsive.

NEW UX DESIGN OBJECTIVES
Develop a complete roadmap to refresh the site, laying a strong foundation for the implementation including updated architecture, navigation, and design.

The design should make user experience simple and intuitive with swift response:
- Identify easy opportunities to improve the current site including making the current site more mobile-friendly and responsive.
- Responsive layout for mobile and desktop
- Homepage and subpage template design
- Style guide compliant

Design deliverables include, but are not limited to, the following:
- Website and user experience audit report, including user analysis, competitive analysis, UX & UI, technical audit, overall website site audit and recommendations
- Strategy and plan, including recommendations, information architecture, wireframe, sitemap, navigation scheme
- Design, including homepage design (editable file), subpage template design (editable file), style guide and CSS

NEW UX DESIGN FUNCTIONALITY
The UX Design should include functionality for:
- User registration and login
- Search option
- Transactional data collection
- Cart

REQUIREMENTS
- Sitemap
- Static wireframes
- User flow wireframe mockup prototype

Please see sitemaps for mydfree homepage with EDU menu with child pages in Appendix A.

OPTIONAL UX DESIGN FUNCTIONALITIES

Depending on the required time and budget the client requests the following:

- User flow diagram sketch
- Storyboards
- Customer journey map
- Taxonomy

SCOPE OF PROPOSAL

1. Collaborate with client and key stakeholders to develop a roadmap to fully refresh the design, navigation, structure and experience for www.mydfree.org and www.mydfree.org/edu (New)
2. Develop a model of New Visitors, Returning Visitors, and dFree (Loyal) Visitors content with structural changes and multiple logged-in statuses to deliver personalized experiences.
3. Provide strategic and technical guidance on improving the platform, WordPress.
   a. Aide in the integration of the marketing stack that includes 3rd party services like SalesForce, Pardot, and Google Ads, etc.
4. Identification of immediate opportunities to improve the current site structure, navigation, and templates to improve the responsiveness of the site and eliminate roadblocks for visitors.
   a. Improve the site's current search engine functionality and display of results.
   b. Identify immediate opportunities to improve the responsiveness of the site as well as mobile experience.
   c. Prepare a list of other "low hanging fruit" that can be considered for immediate action.
5. Collaborate on the implementation of our e-mail marketing programs / campaign to ensure we are properly syncing efforts with landing pages, analytics, and conversion.

KEY DELIVERABLES

- Back-end coding
- Backend Development
- Content Migration
- Front-end coding
- Frontend Development
- Information Design
- Mobile device optimization
- On-site SEO
- Ongoing Support / Retainer
- Project Management
- Quality Assurance and Testing
- UX / UI Planning
- Visual Design

WEBSITE AND USER EXPERIENCE AUDIT

Conduct an audit of the current website and user experience, benchmarking against industry's best practices. The audit shall identify issues, propose enhancements and provide recommendations based on facts, research and data for improvements. The data from Google Analytics will be provided during the project kick-off. The audit shall present qualitative and quantitative findings and analysis including, but not limited to:

- Storyboards
- User journey and navigation
- User interface
- Functionality
- Ease of use
- Content, message and language
- Visual design

Recommendation should reflect audit results, project objectives, propose strategy and project plan including, but not limited to:

- Revamp strategy
- Information architecture and wireframe
- User experience strategy, user journey and navigation

Additionally, the proposal responses should:

- Include SEO campaign set-up and tracking (for ongoing maintenance, including site crawls, insights, and link building opportunities)
- Include look and feel options for review based on existing brand style; includes 2 variations of the homepage and key secondary pages PROVIDED BY DFREE

- Include a content development – full site manuscript, including meta tags, optimized for search - PROVIDED BY DFREE
- Include an EDU Dashboard design that includes link to academies, products, profile information, link for livestream, education plan and billing information. See dashboard samples in APPENDIX B.
- Full layout completed in Adobe XD for implementation in WordPress by a developer
- Setup payment module for purchases
- Provide custom reporting
- Pages should be designed for future expansion and/or plugins
- Must be mobile responsive
- See Appendix C for website style guidance.
- See Appendix D - EDU Website Content and Copy

DEVELOP
- Website build – new section for EDU with new Homepage, Navigation and updated navigation tabs (includes WordPress theme development, database setup, data entry of content, install and configuration of plugins (3rd-party plugin or base fees not included)
- Content integration – populate build with new content
- Content migration
- Site tagging via Google Tag Manager for measurement & analytics around key metrics*
- Pre-launch quality assurance to test functionality
- API integration to pull in course sign-up and functionality from the LMS (needs further exploration; this will entail designing and developing a web app to bring the course experience to dfree; requirements needed) *DFREE Searching new LMS platform service company use.
- Site tagging via Google Tag Manager for measurement & analytics around key metrics*
- Pre-launch quality assurance to test functionality

DEPLOY AND OPTIMIZE
- Site launch
- Post-launch QA and edit
- Verify site on Google Search Console for search indexing
- SEO campaign set up for search visibility tracking and optimization
- Monthly analysis of search performance and recommendations for improving SEO
- Ongoing development support for implementing SEO, content and design updates; website hosting and care
- Web Care (Separate Proposed Request for Maintenance)
- Webhosting costs

Proposed response should also outline support for the following:
ONGOING
- Maintain WordPress install by performing security updates, plugin updates and basic site maintenance on a weekly basis
- Update theme source code based on any WordPress core updates
- Perform website backups on a monthly basis
- Restore website in the event of a failure
- Website and Hosting Care
- Perform website backups on a monthly basis
- Restore website in the event of a failure
- Perform server-level security and software updates
- Manage SSL installation and renewal processing
- Maintain and update dns records as needed

- Manage migration and configuration of new cloud instances in the event of failure
- Monthly services:
  - SEO Strategy and Execution
  - Website management, maintenance and content updates

TECHNICAL REQUIREMENTS

The proposed solution should include:

- eCommerce capabilities – for selling products and event registrations, etc.
- Responsive Capabilities - The website must be fully functional across platforms (mobile / desktop / tablet), operating systems (iOS/ Android / Windows), and browsers (Chrome, Firefox, Safari, and Internet Explorer). Visitors must be able to seamlessly access the website on any device without sacrificing any information.
  - Identify easy opportunities to improve the current site including making the site more mobile-friendly and responsive.
  - Develop a roadmap to refresh the site, including foundation for the implementation, updated architecture, navigation and design.
- Content Management Software – Wordpress
- Web Host – Suggest your recommendation or current provider (AWS)
- Browser Support – Chrome, Internet Explorer, Safari (at minimum)
- Integrations
  - Salesforce – the client uses for CRM
  - Pardot – the uses for marketing and marketing automation
  - Google Analytics
  - Google Tag Manager
  - Google Search Console
  - LMS login area with Single Sign On:
    - Login authentication registration upon entry into EDU section of the website – data capture entry.
    - A-user registration, a teacher registration for Learning, Teaching and Tools – online academy.
    - in class registration as Teacher / student in person instruction – survey capture.

CRITERIA FOR SELECTION

Proposals will be evaluated based on:
- Vendor's reputation and capabilities:
  - Extensive experience in the architecture, design and development of
     responsive websites that generate high traffic and unique visitors, including multi-lingual experiences.
- Creativity
- Delivery time and
- Required investment

WEBSITE BUDGET DETAILS

The **overall budget** for design, development, deployment (launch) and SEO strategy / service (ongoing/ monthly) for this fiscal is **$10,000**.
All proposal submissions must submit the following itemized budget table.

Project Phase		# of Hours	Hourly Rate	or Per Phase	TOTAL Cost
			RATE or PHASE		**TOTAL**
1	**Discovery** *Can include but not limited to: Research, Audit (UX, UI and Technical), Define, Competitive Analysis*				
2	**Analysis** *Can include but not limited to: Brainstorming, Story Boards, Use Cases by Persona, Experience Mapping, Workflow Diagrams, etc.*				
3	**Design** *Can include but not limited to: Mood Board, Sitemap, Sketching, Wireframing, Prototyping, User Testing, UX Guidelines, UI Style Guide for EDU area, Homepage & Subpage Template*				
4	**Production & Evaluation** *Can include but not limited to: QA, Usability Testing, User Testing, Content Migration, BETA Launch, Launch, Reporting, A/B Testing and Iteration*				
	TOTAL				

Additional costs (valid for 6 months starting from the day of service appointment)

Design service for additional subpage templates

Design (editable file), per style guide and CSS

Additional hourly rate for the task beyond stated scope

Training

Content Management / Updates

SEO Services

Ongoing / Monthly

PROPOSAL FORMAT & DELIVERABLES

Please submit response with deliverables according to the following guidelines:

Proposal Length: Excluding the cover letter and samples of previous clients / projects, the complete proposal shouldn't exceed 15 pages.

Proposal Format: PDF, no more than 2 separate files.

Proposal Contents (Checklist):

SECTIONS	PAGES
1. **Cover Letter (Intro)** *Signed by person or persons authorized to submit on behalf of agency.*	Up to 2
2. **Company's Overview and Capabilities**	Up to 2
3. **Proposed Solution / Strategy** *Strategy for achieving goals, Information Design: Sitemap: Mydfree.org with new EDU section; Wireframes: for dfree homepage & EDU homepage*	Up to 4
4. **Development Timeline**	1
5. **Proposed Budget** *Use table in RFP document*	1
6. **Terms of Service**	1
7. **1 or 2 Relevant Project / Business Case**	Up to 3
8. **2 Client or Project References** *Contact Name, Project Details, Contact Information (phone number, email address)*	1

Proposals and questions should be submitted via email, using subject line, **dfree Web Design RFP** to: **Kyle Harrison at kharrison@mydfree.org** and **Leon Largie at llargie@mydfree.org**.

CONTRACT TERMS

Contract terms will be negotiated upon selection. All contracts are subject to review by client, dfree® Global Foundation and their legal counsel. Project will be awarded upon signing of an agreement or contract, which outlines terms, scope, budget and other necessary items.

RFP PROCESS l TIMELINE l DETAILS

RFP Process
1. RFP Distribution
   a. Proposal submission
   b. Vendor pricing
   c. Use Cases with Results
2. Consideration
   a. Vendor Presentation
   b. Reference Checks
   c. Vendor Q&A
3. Evaluation
   a. RFP Final Scoring
   b. Final Decision
   c. Contract Negotiation
   d. Contract Award
   e. Notification to competing bidders

The deadline for returning / submitting RFP responses is **Friday, April 10, 2020 by 5 pm EDT.**

Project Completion Goal: June 2020

dfree® Homepage menu bar layout examples with new EDU area

OPTION 1 – Removing "dfree Academy" Tab and Adding All EDU Phase 2 Dropdowns to Current Website

Get Started	dfree EDU	Get Control	Get Ahead	Give Back	dfree Media	Who We Are	Young Money	BDC
dfree Movement	What is dfree EDU	Books	Get Connected: News & Updates	Partners	dfree TV	Contact Us		
Program Overview	Individual Learning	Expert Videos	dfree Newsletter	Volunteer	dfree Podcast	About Us		
dfree Experience	Organization Engagement	Tips for Graduation and Beginners	dfree e-Mag	Donate	dfree Blogs	Events Request		
	EDU Classroom (Coming soon)	Loyalty Program	Conferences	dfree Ghana	31 Day Makeover			
	Program/Resources		Events					
	Shop		Young Money Events					
	Contact Us		Stay Connected					
	Log-In							

OPTION 2 – Removing "dfree Academy" Tab and Adding Only Temporary EDU Dropdowns to Current Website

Get Started	dfree EDU	Get Control	Get Ahead	Give Back	dfree Media	Who We Are	Young Money	BDC
dfree Movement	What is dfree EDU	Books	Get Connected: News & Updates	Partners	dfree TV	Contact Us		
Program Overview	Our Curriculum	Expert Videos	dfree Newsletter	Volunteer	dfree Podcast	About Us		
dfree Experience	Getting Trained to Lead dfree	Tips for Graduation and Beginners	dfree e-Mag	Donate	dfree Blogs	Events Request		
	Dfree Online Academy	Loyalty Program	Conferences	dfree Ghana	31 Day Makeover			
	Books and Workbooks		Events					
	Billion Dollar Challenge		Young Money Events					
			Stay Connected					

OPTION 3
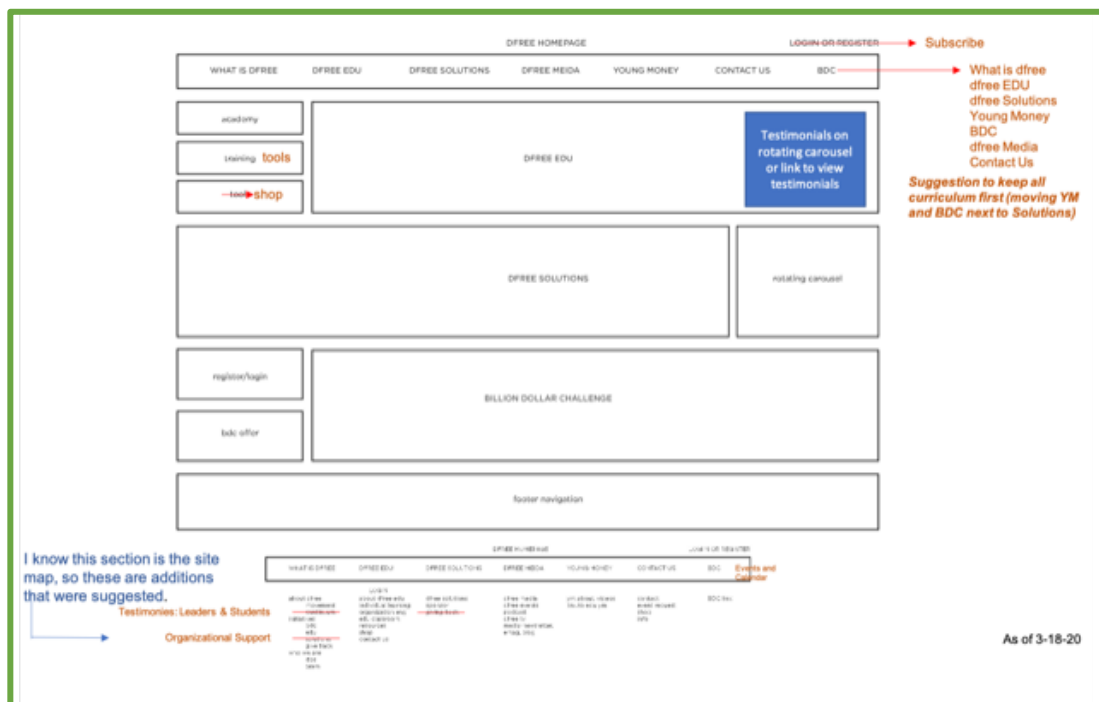
APPENDIX B

EDU visitor profile / dashboard inspirations
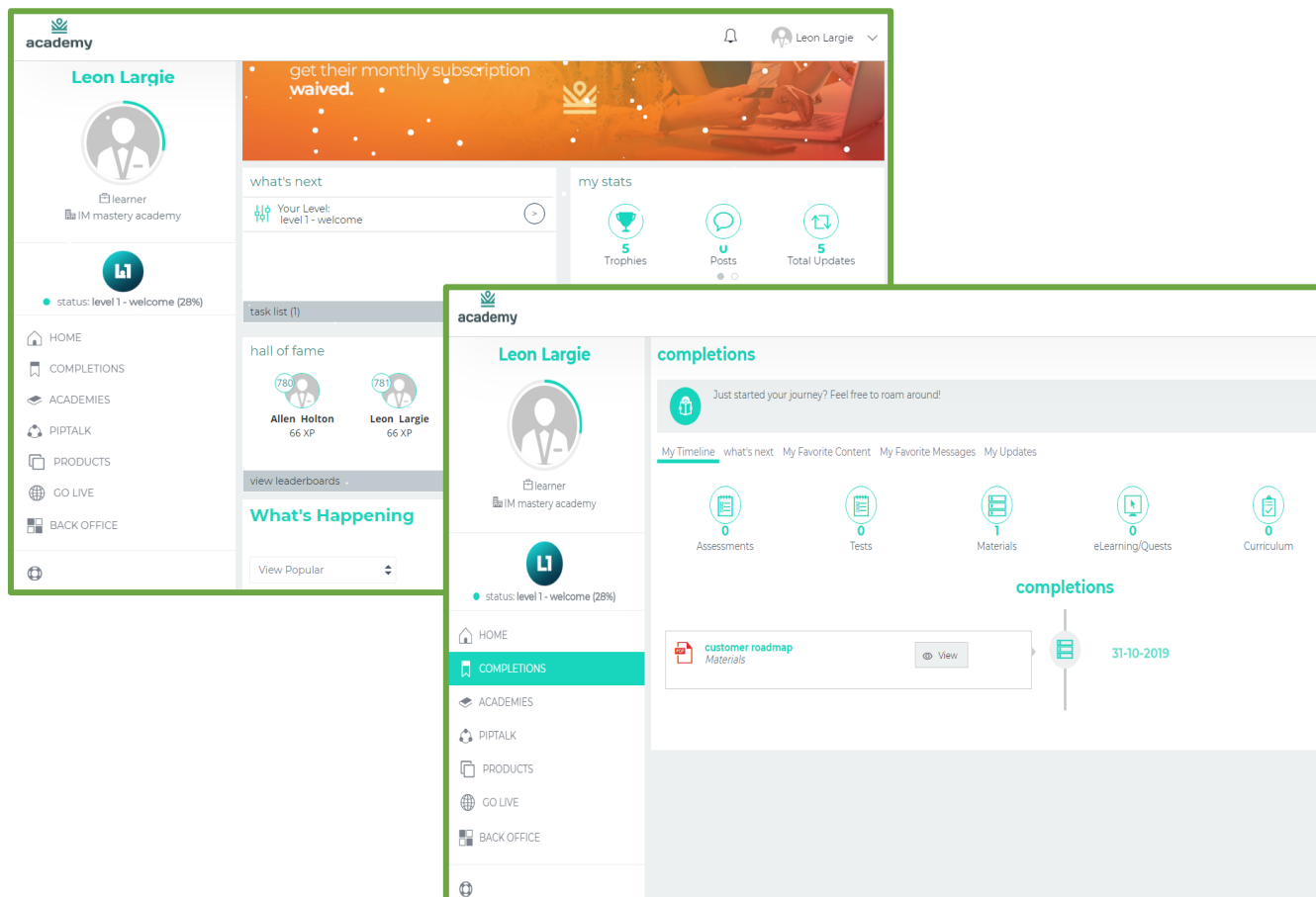
dfree® website style and design guidance

Correct dfree® application

dfree® ~~Dfree®~~ ~~DFREE®~~ **Always** include a ® (superscript)

For dfree® homepage, new EDU landing page and all subpages / sections:

COLORS

PRIMARY

⬤ #6BA542   ⬤ #000000   ◯ #FFFFFF

SECONDARY

⬤ F36B22

TEXT

HEADERS	**BODY COPY**
Font: Gotham Book/Gotham Bold	Font: Gotham Book
Size: 40	Size: 29
Accepted Colors: ⬤⬤◯⬤	Accepted Colors: ⬤

Header
Body Copy

EDU Homepage Content and Copy

dfree EDU
Financial Freedom. Learning today for a more secure tomorrow.

What is dfree EDU

dfree® EDU is the educational and training department of dfree. We support you in your individual learning or the launch of a group. dfree EDU is all about sharing tools, tips, and tactics regarding your finances. Learn how to be a mindful consumer, informed investor, strategic saver and a joyful giver. We're excited to help get you started with our online academy providing training so you can launch dfree in your church, community or organization.

Our Curriculum

dfree "Say Yes to No Debt" curriculum is a financial freedom curriculum based on biblical principles and designed to help individuals and organizations learn the strategies to move from debt, delinquencies and deficits and experience the freedom of deposits, deeds and dividends.

We have expanded from our original concentration on eliminating debt into a comprehensive movement with a commitment to helping people achieve complete financial freedom. We are the only faith-based wealth-building system specifically designed with the black community in mind.

The dfree curriculum is designed to teach you how to:
- Pay down debt and get rid of credit cards
- Build an emergency fund
- Build wealth through investments such as real estate, stocks, bonds and diversified portfolio

- Protect your wealth through tools such as risk management, life insurance, disability insurance and long-term care
- Leave a legacy

Getting Trained to Lead dfree in your Church, Community or Organization

dfree operates from a Train-the-Trainer model that allows the dfree EDU Engagement + Training Team to train thousands of people on the best way to teach the dfree curriculum, while sharing effective tools and strategies to help customize the curriculum for your church or organization.

Becoming a Certified Trainer

We have an online training webinar that allows you to become certified to teach dfree by participating in a 3-hour online training. This recorded training can be completed in the privacy of your home and at your own pace. Once you have completed the training, we will provide you with a leader's guide and facilitators guide which provides in-depth content, presentation slides, training tips and more to support you in leading dfree classes.

Additionally, we have live training webinars quarterly and live training events throughout the year so you can get trained to launch and lead dfree classes in your church or organization. For information on upcoming training options, please check our events calendar. (link to events calendar)

dfree Online Academy

Starting the journey towards financial freedom from the comfort of your home.

The dfree Academy is an online course that was created to offer individuals, churches and community organizations a convenient way to provide easy access to the dfree curriculum in a self-paced online class.

What You Will Learn
- How to manage your finances, save money, invest money, plan for retirement, etc.
- How to become well equipped with practical approaches and values-based principles
- How to find and maintain financial freedom so you can focus on your life's purpose

Requirements for Online Academy:
- Obtain a copy of the **Say Yes to No Debt: 12 Steps to Financial Freedom and the workbook, dfree Lifestyle: 12 Steps to Financial Freedom (add links to purchase)**
- An up-to-date browser and operating system on your computer, tablet or smartphone.

Our team is always here to support you with any questions or concerns you may have. Contact us at info@mydfre.org or 1.844.mydfree (1-844-693-3733)

Click here to register for the online academy. (Verify link for registration)

Books and Workbooks

The book, **Say Yes to No Debt: 12 Steps to Financial Freedom and the workbook, dfree Lifestyle: 12 Steps to Financial Freedom** go hand in hand and are designed to teach you strategies, help you develop your spending and savings plan, understand importance of creating a budget, recognize the difference between needs vs wants and other financial freedom tools, while being guided by biblical principles, meditations, affirmations and prayers.

Reference Link: https://mydfree.org/get-control/books/

Billion Dollar Challenge – ***Your online tool that leads you towards financial freedom.*** Billion Dollar Challenge (BDC) is a free interactive, secure web-based tool designed to help users develop a strategy to pay off their debt or save for the future.

Looking to get out of debt? Use the tool to see the various accelerated payment options, then the tool supports you in deciding how much you need to pay monthly to be out of debt by your goal date. Every time you report a

payment made, the tool will recalculate your debt so you always have a snapshot of your debt and date you will be financially free.

Ready to start saving for your future? Well, it works the same way. You determine your savings goal and let the tool help you calculate your savings strategy.

Benefits to Individuals: Billion Dollar Challenge is easy to use, and people love how it helps them stay on track to meet their financial goals with the benefits of improving creditworthiness, reducing stress, increasing savings, building wealth and encouraging users to live within their means. The site is totally secure and does not capture credit information or account numbers, there are no worries about personal information being shared.

Benefits to Organizations: Organizations embrace BDC because in many cases, it is the first step in introducing an economic conversation and users in the group can participate from the privacy of their own home. The administrator simply creates an account for the organization and participants can securely join the group and create a private profile of their debts and payments made. The administrator can monitor how much debt collectively the group has paid off; however, they cannot see the participants individual debt and payments. In addition, because the site is totally secure and does not capture credit information or account numbers, there are no worries about personal information being shared.