



UK-GBC Website, CRM and connected digital tools

Request for Proposal, January 2011

Introduction

We're looking to redevelop our website and internal business tools and are looking for a partner to work with to deliver these.

We have developed a digital communication strategy, which identified a number of key technical issues which need addressing before we can better communicate with our members and wider audience. We're inviting you and other parties to submit a proposal on how you feel you could support us as our digital partner. This document will summarise the key things we're looking to achieve, and provide you with a structure to respond in.

Primary Contact Details

For any additional questions or information you require on this RFP or process, please contact:

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RFP Schedule

RFP delivered to agencies	Jan 10, 2011
Questions/Comments/Feedback to UK-GBC	Jan 14, 2011
Proposals submitted by	Jan 21, 2001
Presentations for shortlisted agencies on	w/c Jan 24, 2011
Decision upon partner made by	Jan 31, 2011

Introduction to the UK-GBC

The built environment has a great influence over our daily lives, from our homes to our places of work, learning and leisure. Being so fundamental to our way of living, it's perhaps unsurprising that buildings have such a significant impact on the environment. In the UK, buildings are responsible for 43% of our total carbon emissions and they also impact on the production of waste and the consumption of water, timber and other materials.

This sector has the opportunity to be at the forefront of finding solutions to the urgent problem of climate change; solutions which are not only environmentally sustainable, but have positive social and economic effects.

The UK Green Building Council (UK-GBC) was launched in February 2007 to bring clarity, purpose and co-ordination of sustainability strategy to the sector. The Government's 'Sustainable Buildings Task Group' had earlier reported that no one body or organisation was providing clear direction for the sector as a whole. The UK-GBC was established to fulfil this role.

We are a membership organisation, primarily consisting of businesses from across the industry with currently 330 members as of January 2010, with an ambition to reach around 700 in three years. We bring together anyone involved in the complex process of planning, designing, constructing, maintaining and operating buildings, along with NGOs, academic institutions and government agencies. Our members approach sustainability not only as a challenge, but as an opportunity and are committed to our campaign for a radical transformation in the sustainability of our built environment.

We have recently become a registered charity.

What we do

We campaign for a sustainable built environment, one which benefits people, business and the planet through the following activities:

- **LEADERSHIP:** We provide leadership and clarity for the industry on sustainable building and champion this agenda in government, politics and the media.
- **INFLUENCING GOVERNMENT POLICY:** We try to ensure that government policy is based on the best technical evidence and industry knowledge – ambitious, yet deliverable. Members inform the UK-GBC response to government consultations.
- **TASK GROUPS:** Time limited task groups tackle specific problems, directly influencing government policy or providing guidance for use by the industry. Read more about our past and current task groups [here](#)
- **EVENTS:** We offer over 20 events a year, including case studies of exemplar buildings, technical debates and networking receptions. View our list of upcoming events for members [here](#).
- **TRAINING AND EDUCATION:** Our Sustainability Training and Education Programme (STEP) aims to expand knowledge and build capacity across the sector. Find out more about our current course offerings through the STEP website.
- **ONLINE RESOURCES:** Our website is a key resource on UK-GBC activity, government policy, industry initiatives and other must-know information, like business cases for sustainability. We are gradually expanding our 'information centre'.
- **A GLOBAL NETWORK:** We are affiliated to the World Green Building Council – a network across almost 80 countries, providing an invaluable source of information and experience. We work particularly closely with those GBCs in the EU.

Our current situation

Our current website and internal tools have grown and evolved over time, some have grown with us, others not – and rather than continuing to build upon these, we’ve decided to take a step back and look at the bigger picture. Many of them are siloed and do not integrate at all, the website is not as flexible and reactive as we’d like, and our membership database does not really support scaling to a larger organisation. As a result, we want to create a solid new foundation to build our digital communication upon, starting with strategy, and then technology – so the next three years of the UK-GBC allows us to focus on doing great work, rather than struggling with inefficient tools.

Our Communications Strategy

Over the past six months, we have developed a new digital communications strategy – which has a number of key strands

Content - Content is king. That’s why our strategy is focused around Content and how we can use it to serve our members and achieve our goals. Our content falls under two main types – push and pull. Information which is requested upon demand (Pull) and information which is offered up for reading because we feel it is timely or interesting for our audience (Push). In the middle of this is Editorial content where we will highlight content on the website so visitors have a curated experience.

Targeting - Delivering content to our audience which is relevant and useful is key to keeping our audience informed and reducing lapsed memberships. Content should be tailored and targeted to the person consuming it. If we know they’re interested in a particular theme, let’s make sure they hear about new articles in that area. We need to build up insights into our members and audience through tracking, profile information and activity on the site, and integrate the website experience with the CRM intelligence.

Channels - The website is core to our digital strategy, but not the only place we exist in. Email, Twitter, LinkedIn, partner forums and linked member websites – they’re all considered in the strategy, and the website will occasionally need to power these other channels. In any case, we’ve defined the role for each channel we inhabit, to make sure we’re making best use of them.

How does this manifest itself?

Website

We want to create a website which:

- clearly explains to new users what the UKGBC does;
- provides well structured access to content and resources for members;
- offers editorialised curated homepages to introduce any users to themes and topics
- supports event listing and ticket purchasing
- tracks behaviours, interests and interactions of our members into our CRM tool
- allows users to opt-in/out against specific mailing lists
- offers regular and relevant updates based upon preferences and interests of users
- fresh, user friendly and clear design

Some of the key functionality we're hoping to deliver is below, this is not exhaustive, but demonstrates some of the critical functionality we require, some of what we hope will be possible in time, and other ideas and suggestions.

Introduction to UK-GBC – what does the UK-GBC do, who is behind it, what are its goals, aims and objectives

Our Members – introduces our members, showcase their activity and involvement with us, explain the benefits of membership

Members Login – ability for users to register, members and non-members, to access content which is only available for registered users.

Resources Area – a large database of content, articles, opinion, white papers, reports, documents and resources, as well as rich media such as video, audio and non web-based files like Word and PDF files. A range of authors, both UK-GBC and our members will be writing content.

Content Themes – curated pages collecting together articles and content on particular topics. Each month a different theme will introduce users to a topic and signpost them to content around the site.

Search and Navigation – easily accessible content via both simple and structured navigation, and a powerful search engine which lists articles as well as uploaded files and rich media.

Events and Ticketing – event calendars, integration with EventBrite to list our event activity, and support for posting images, video and post-event content. As we're not looking for full ecommerce

functionality, EventBrite will look after the payment and ticketing, but all information should be visible within the site and data on ticketing integrated back into our systems

Training – information on our training course, and potential integration with our third-party course providers for course sign-up, sign post other courses, etc.

CMS – a flexible and robust content management system which supports the required functionality and the ability for you to develop the CMS to provide any bespoke functionality as needed

CRM Integration – integration with a CRM platform to provide user accounts and user profiles, plus intelligence and analytics on user activity

Personalisation – tailored content for users, simple details like name and interests, but eventually fully personalised content areas and homepages to form a highly useful resource.

Permissions and Groups – we want to have quite granular control over which users and groups can have access to certain parts of the website and certain files and pages in the resource centre. Ideally it would be linked to groups within the CRM, and we'd want to be able to add and remove users easily.

CRM and Members Database

The contacts database will be at the heart of the website, controlling user accounts and insight for any user visiting.

The contacts database should be much more than simply contact information, but become a rich history of each user's interests and interactions with us, allowing us to track information like which events they've attended, which reports they've accessed, which mailing lists they're members of, which articles they've downloaded, whether they've been invited to task groups, and so on.

It will be a CRM tool which allows us to interrogate the database to further interact with members online and offline based upon their history and interests.

We currently use Access and Act! to collect our member information, but this is no longer adequate, and feel we need to implement a more robust, hosted system, such as Salesforce, in order to provide scale, access for all of our team, and to easily integrate the members information into the website.

Email

Email is a key part of our communications with our members, and whilst we want to introduce more segmented mailing lists so we're able to target sub-groups of our audience, we're generally happy using MailChimp for sending emails.

We'd like to use the CMS to create the emails, and our CRM to track opens/reads and maintain mailing lists, but MailChimp is fine for the actual broadcast of emails themselves.

Events

Events are a large part of what we do, and rather than developing a complex events CMS, we feel that using EventBrite as a complete event and ticketing solution is suitable for us. We have specific needs for events and how ticketing and pricing works, and EventBrite handles this well – but we'll need it integrated with our site and CMS, so events can be listed, and information on who is attending can be held in the CRM. Using EventBrite also means we do not need to worry about ecommerce solutions just yet.

Finance / Data Management

We use Quickbooks internally, so any systems which we start using need to be compatible in some way with Quickbooks – or at the very least processes to be in place to painlessly manage reporting of purchases in EventBrite, or the raising of invoices for actions such as new registrations.

Development and Iteration

We very much see this project as on-going, with regular functional updates and additions to the site as new requirements arise, but also in order of priority to the organisation. We see the benefit in releasing sooner rather than later, and iteratively developing the website over time, providing that we can launch with a significant improvement for our users and for the UK-GBC as editors of the site.

What will make the project a success?

Externally our aims are to increase understanding and awareness of the UK-GBC, reduce lapsed membership, increase new membership and numbers of people within our membership organisations who get involved with the UK-GBC, and to provide a world-class service to the sector.

Internally, we want to reduce duplication of effort and inefficiencies by creating integrated tools which work well together, allowing us to focus on supporting our members, rather than managing databases.

Technically, we want to develop a platform which will grow with us, and support new business requirements which occur as our organisation changes.

What are we looking for in a partner?

We'd like to find a team who will be our digital partner over the next three years. This partner will work closely with us, becoming an extended part of our team, and we hope will proactively get involved in the continued development of our communications strategy and planning.

We want to find a team who are interested in sustainability and the important issues which we face as an organisation and sector, a team who have strong experience in usable design, understand how technology can make things easier for both the UK-GBC internally and our members externally, and the pressures which charitable bodies like us face when it comes to funding.

We're keen to find a partner who believes in the ethos of open-source technology and agile thinking, and clearly experience in implementing CMS and CRM. We know that the digital landscape is always

changing, and we'd like to find a partner who is ready to change and develop with us as we attempt to do the best we can for our audience.

Deliverables for this RFP

We would like to receive, from you, a proposal on why you feel you would be our ideal digital partner and could help us develop a new website and set of tools to support our digital communications strategy.

You should provide explanations of your approach and methodology when working on projects like this, your thoughts on technology, platforms and implementation, the type of team who you'd resource to this, and what you think a project roadmap or timing plan might look like for us.

We'd like to also see some background and information on your team and experience, whether you'd manage the project internally or use external partners, and some relevant case studies.

We'd also like your input on our budget estimations, how you feel it should be managed over the course of three years, and how to best spend this budget considering we are a charitable organisation.

We are not looking for creative work (visual designs, wireframes, etc) at this stage, only your process and thinking on the project.

Deliverables for the relationship

Requirements gathering; website planning, specification, design and build; Content management system; planning and implementation of CRM (Salesforce or similar), integration of CRM and website/CMS, integration of email platforms, integration of event platforms, ongoing support, maintenance and both proactive and reactive additions to the suite of tools, training or the organisation of training for the CRM, email, events and CMS platforms; account and project management, regular working sessions with us to review the website and internal tools to measure their effectiveness and new opportunities.

Timeframes

Our aim is to develop a set of tools which will last us a long time, rather than to rush their development for the sake of launching sooner. We would love to have something to show our members for the EcoBuild event during March 2011, but appreciate that may not allow for a great deal of time. We'd rather understand your take on the project, and develop a roadmap or schedule of activity to see where a first release would be most sensible.

Budgets

We have estimated that we will need to spend around £40K-£60K in the first year, and then a budget of around £20K per year thereafter, depending on new requirements. This budget is likely to include software licenses and potentially internal resource for managing content.

We are asking our agencies to propose what they feel is a suitable project budget for implementing the above functionality, but to bear in mind we are a charity, and to make recommendations on how best to invest in our digital platforms over the next three years.

Timetable for Proposals and Decision Process

The timetable for responses can be found on the first page of this document. We will be inviting shortlisted agencies to present their proposals to us, and then be making a decision based on your responses.

Contact Information

If you have any questions regarding this RFP or the UK-GBC, please contact Ellie Austin (ellie.austin@ukgbc.org) or 07530 660801.