GivingTuesday

Request for Proposal (RFP)

For

National Philanthropic Trust's History of Giving Web Platform

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1. Project Overview

1.1 Summary & Background

GivingTuesday (GT) is partnering with National Philanthropic Trust (NPT) to carry out a full redesign of the NPT History of Giving web platform. The main deliverable consists of a digital resource/web exhibit that illustrates the diversity and interconnectedness of philanthropy and giving practices across cultures and history in an innovative way.

GT is issuing this Request for Proposal (RFP) on behalf of the partnership to facilitate the selection of a creative web design vendor capable of bringing the vision for this new platform to life, in accordance with the requirements and objectives described. As part of the

proposal, GT requests that candidates submit a services cost estimate for the work described.

In 2016, National Philanthropic Trust launched its [History of Giving website](#), a research-based digital resource that highlights historical milestones in giving around the world. The site occupies a unique position as the single consolidated online source covering the story of modern philanthropy through the lens of different people, regions, and events.

While the site remains a useful academic tool, NPT has identified the need to refine the vision and broaden the scope of this project in order to increase its utility as a modern resource and reach a wider audience.

Core Vendor Skills and Capacity Required

In order to achieve the objectives of this redesign for NPT, GT is seeking a web agency with

1. Established UX experience and expertise
2. Demonstrated experience with effective and creative storytelling
3. Strong front-end development and technical solution integration capabilities

1.2 Organizations

About National Philanthropic Trust

Founded in 1996, National Philanthropic Trust (NPT) marks its 25th Anniversary in 2021 as the largest national, independent public charity that manages [donor-advised funds](#) and one of the leading grantmaking institutions in the U.S. Since its founding, NPT has raised more than $24 billion in charitable funding and has made more than 400,000 grants exceeding $12.4 billion to [nonprofits around the world](#). NPT annually publishes the *[Donor-Advised Fund Report](#)*, the sector's authority on the state of DAF philanthropy. Visit NPT's resource library to learn [what you can do with a DAF](#) and NPT [impact investing options](#). More at [NPTrust.org](#) and [NPTGivingPoint.org](#).

About GivingTuesday

GivingTuesday is an independent nonprofit organization and a global generosity movement that unleashes the power of radical generosity around the world. Created in 2012, it is rooted in a simple idea: a day that encourages people to do good. Over the past nine years, it has grown into a global movement that inspires hundreds of millions of people to give, collaborate, and celebrate generosity year-round. The movement is brought to life through a distributed network of entrepreneurial leaders who lead national movements in 75 countries and hundreds of communities worldwide, including more than 250 community campaigns across the U.S. alone.

1.3 NPT History of Giving Platform Objectives

The platform should enable a broad audience to explore the history of giving and generosity in cultures around the world, connections among them, and the evolution of philanthropy, in

order to deepen understanding of and increase participation in a broader array of generous acts.

High-Level Impact Goals:

1. Change the way the sector conceptualizes "philanthropy" to allow for greater embrace of diverse cultures of giving.

2. Contribute to a truly inclusive social sector by spotlighting the different perspectives of diverse types of beneficiaries, givers, traditions, and cultural context.

3. Spark ideas and reveal connections that will contribute to the work of those already striving to help the nonprofit and philanthropic sector evolve.

4. Spur innovation by allowing program and campaign designers to draw from a much more diverse set of tools.

5. Influence the average person's fundamental understanding of the philanthropy sector and practice to ensure diversity and inclusion are built in.

6. Defy expectations and preconceived notions about what philanthropy is.

Indicators of success
- Increased adoption of this resource (users/visits)
- Increased citations/reference of this resource (mentions, links, PR)
- Contributions to this resource (submissions, related content)
- Diversity of users/contributors/content

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2. Platform Design Brief & Details

2.1 Functionality and Design Requirements

This platform will count, document, and highlight different types of generosity across cultures. It will do so primarily through the creative display of "items": articles, images, video, stories, and other relevant media and content types that relate to or express an aspect of the history or practice of giving and philanthropy.

A few examples of items:
- Unique stories of generosity
- Cultural traditions and their origins
- Notable figures in the history of giving and philanthropy
- Specific practices or cultural concepts

This content will be organized and managed in such a way as to allow different users to search for and discover information relevant to their use case in a logical way.

Interfaces to design

Interfaces will allow users to view different collections of items (e.g., by region, country, demographic). These will generate displays based on the relevant attributes for the given sub-collection to be displayed.

As the platform continues to grow and evolve, non-technical GT/NPT users and admins will need to be able to integrate new content. Interfaces allowing GT/NPT users and stakeholders (admins) to add new content to the collection of items, and to edit existing items themselves will also need to be created. It will be necessary to ensure that adding more categories and attributes is possible, as different search patterns for different use cases are identified.

Translation & Localization

While the initial deliverable will be produced in English, the long-term vision for the web resource includes translation into a number of other languages to promote global engagement and achieve greater inclusivity. Long-term plans for multiple languages must be taken into account in the early design phases to ensure that multilingual functionality remains a possibility for the future.

ADA Compliance

The platform should be designed with accessibility in mind. Great care should be taken to ensure that the platform provides full and equal access to the extent possible, taking into account ADA guidelines to accommodate and meaningfully include users with disabilities.

2.2 Design objectives

The platform should allow for different experiences, based on the user and use case. These will be discussed in detail with the selected vendor, but two broad categories are identified here.

The first consists of users who visit the site without any prior objective, but simply out of curiosity or to learn and explore. These users should:

- Be guided through a narrative-driven "planned user journey" that will shape their understanding of a specific philanthropy framework
- Have enough flexibility to explore the areas that interest them more deeply
- Be impressed by the richness of the information and surprised by unexpected content.
- Immediately understand that the information is reliable and academically sound
- Be struck by diversity of regional content and practices
- See themselves and their identity reflected, no matter their background

- Have the opportunity to easily share pieces of content via social media
- See calls to action to contribute content and knowledge to the site's content

The second group consists of users seeking information with specific attributes. In addition to the design objectives above, these users should:

- Find the content they seek by defining their search parameters.
- Have relevant content displayed to them in any number of visually appealing ways.
- See connections between their desired content and "adjacent" content, such that they may find more than what they thought they were looking for
- Get inspired/encouraged to explore content outside of their original search parameters

2.3 Target Audience

There are many users in mind, as listed below, but above all we endeavour to create a tool that speaks to the innately curious – individuals and organizations searching for new sources of inspiration and knowledge to bring about positive change in the world. Specifically, our target audience groups include:

Primary User Groups
Academics - Philanthropy focus Researchers Students Educators (various student levels) **Media** Reporters Journalists **Social sector** Philanthropy community of thought leaders Non-profit leaders and employees Funders Grantmakers Service Providers Community group/grassroots organizers **Government agency employees** Program builders and managers **Private Sector** Social capital specialists Impact investors

Social enterprise
CSR/ESG specialists

Individuals
Adult - Philanthropists, Givers, and volunteers

Secondary user groups include academics from all disciplines, private sector actors (Fintech, Crowdfunding, Wealth managers), artists and writers (playwrights, authors, speech writers, faith-based institutions, and the general public (adults and youth).

2.4 Current Website

The current version of the NPT History of Giving website can be viewed at
https://www.historyofgiving.org/

Some aspects of the site are worth bearing in mind for the redesign, while other will require more of an overhaul:

Aspects to Keep	Important Changes
- Utility as a repository for a vast library of accurate, reliable content related to giving and philanthropy across the globe and throughout history - Categorization of the various pieces of content (e.g., by region, time period) to facilitate exploration and generation of displays and sub-collections. An improved approach to this will be a core pillar of the reimagined site - Dynamic visualizations such as the integrated map (currently broken) offer an idea of the type of innovative visualization features desired.	- Greater diversity of content origin, type, and layout - Improved content management and flow, to allow different user profiles to access the content that will serve them - Improved tools to encourage exploration, learning, and unexpected discovery - Content sharing functionality that encourages and enables users to share content via multiple channels - More joyful and inspiring palettes, themes, and visual styles

2.5 Tech Specifications and Requirements

Knowledge Base Software
The entire collection of History of Giving content items will be stored in GivingTuesday's knowledge base: a software that allows for simplified content entry and updates, to be displayed and explored on an indicated web page.

Searching and discovering using items and attributes
In the above software, each "item" in the collection will be linked to all of the attributes used to categorize and find it, including metadata. Searching and discovering items and sub-collections may be executed via use of tags, complex vocabularies/hierarchies, or more flexible approaches, like keywords. The specific technical approach for searching and discovering will be determined with the vendor.

API Integration and front-end expertise
The selected candidate will be required not only to create interfaces for displaying content, but must pull content from the GT knowledge base software using API calls as needed.

Given that the platform will also feature an interface that allows admins or users to add content items, the platform must allow for content to be written via API to the GT knowledge database, which will then serve those items to the front-end interface.

To carry out this work, the selected candidate will collaborate and coordinate with the GT technical team to communicate and determine design needs. The GT technical team will modify and adapt the API to meet these needs and ensure desired functionality. The GT team will be responsible for building out the API, but the selected candidate will be required to demonstrate considerable front-end development proficiency in order to execute on the interface design.

3. Proposal Requirements and Candidate Selection Process

3.1 Evaluation Criteria

The ideal candidate will demonstrate a clear understanding of the project ambition and objectives and a means of achieving them. The candidate will have the capacity to meet the basic resource requirements for the project, describe the contours of the types of solution they envision, lay out a clear design process that promotes collaboration and experimentation, and demonstrate appropriate technical proficiency. The selected candidate will also show alignment with and dedication to the values that GT and NPT would like to promote through this project, which are illustrated in the GivingTuesday values statement.

Candidates will not be evaluated based on any specific design, but rather on their ability to convey an approach and process as described below.

Category	Criteria - The ideal candidate:
Creative Approach	Demonstrates an innovative and modern visual/UX design approach through their portfolio or samples.
	Provides interesting and engaging content management/organization examples.
	Incorporates media (images, videos, graph, audio) in a seamless, user-friendly way.
	Demonstrates a clear understanding of the described target users and audience and can articulate how the design will respond to their desires and needs.
	Provides examples that highlight opportunities for user engagement and participation.
	Describes solutions for easily extracting content for blogs, social media, and other communications channels from site content.
Design Collaboration Process	Elaborates a process with ample opportunity to provide feedback or change course when something proves unworkable or a better solution is found.
	Elaborates a design process that makes room for experimentation and testing various solutions until the right one is discovered.
	Demonstrates capacity to quickly understand and integrate feedback or provide a strong counter argument or alternative solution.
	Includes clear points of engagement with GT in the design process.

		Has ideas for incorporating different user journeys that will serve the described use cases and achieve the described outcomes.
Technical Approach		Demonstrates a strong grasp of technical solutions and how to integrate them into the process and product.
		Demonstrates knowledge of the latest content organization and management theory, practices and tools and mastery of relevant tech.
		Can provide clear examples of how content organization/management background how solutions can achieve the desired result.
		Demonstrates familiarity with API integration.
		Demonstrates sufficient front-end development skill and expertise.
		Demonstrates capacity to incorporate the highest accessibility requirements, in accordance with the ADA and other other accessibility standards.
		Demonstrates significant understanding of long-term requirements for long-term maintenance of tech stack and capacity to create a manageable maintenance plan.

3.2 Proposal Elements

Candidates are requested to submit a file containing:

1. A broad description of their creative approach, design process and technical expertise.
2. Examples of past projects that demonstrate capacity to meet the criteria outlined.
3. A reasonable estimated timeline for completion of work, clearly describing how we will be involved.
4. An indication of staff resources necessary and available to devote to the project
5. A budget for the proposed scope of work

6. Clear indication of the type of resources required from us and how these resources would be defined.
7. Any supplementary information or documentation that may be beneficial for showcasing the prospective vendor's abilities.

3.3 Selection Process

1. **Proposal evaluation** (August 1 - October 15)
   Each proposal will be scored based on capacity to meet the criteria outlined above.

2. **Interview #1** (October 15 - October 21)

   Top candidates will be selected for an interview and discussion around approach, process, and any sample design elements. Candidates are **requested to spend no more than two hours** on any high-level design ideas or samples they wish to present at this time (design samples not required). Our objective is to find an agency that is the right fit for this project based on their qualities, expertise, and processes -- not to extract any design work through activities associated with the RFP. The interview will focus primarily on the ability to grasp the vision for the platform and capacity to lead successful design collaboration driven by the right process for the project.

3. **Interview #2** (October 21 - November 1)

   The top two successful candidates may be requested for a second and final interview to gain a more detailed understanding of candidates qualifications and approach.

4. **Final Candidate selection announcement** (November 1)

Proposal Submission

All candidates are requested to submit their proposal to data_pm@givingtuesday.org by November 1, 2021. For questions or additional information please contact Lexa Wilson at the same email address.