



**United Way**  
Maritimes

# United Way Maritimes Website RFP

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**Product/Services to Procure:**  
**Deadline for Proposals:**  
**RFP/RFQ #:**  
**RFP/RFQ Contact:**

**United Way Maritimes Website RFP**  
**March 28, 2025** (4:00pm AST)  
UWM\_003\_2025  
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## RFP Description

This Request for Proposals (the “RFP”) is an invitation by United Way Maritimes to prospective Proponents to submit proposals for website development and maintenance services, as further described in the RFP Deliverables section of this document. United Way Maritimes, which serves geographic locations in three provinces (Nova Scotia, PEI, and New Brunswick), is seeking a competent and qualified Proponent to provide comprehensive website services for its online presence. Website services shall include website design and development, basic ongoing maintenance, content population, search engine optimization (SEO), and analytics reporting.

## Proponent Must Be Single Entity

The Proponent must be a single legal entity that, if selected, intends to negotiate and enter into the contract with United Way Maritimes. If the proposal is being submitted jointly by two or more separate entities, the proposal must identify only one of those entities as the “Proponent.” The Proponent will be responsible for the performance of the Deliverables.

## Contract for Deliverables

The selected Proponent will be requested to enter into direct contract negotiations to finalize an agreement with United Way Maritimes for the provision of the Deliverables. The initial term of the agreement will be negotiated as part of the contract. Pricing will be held firm by the selected Proponent for the initial term of the agreement and any extension options exercised by United Way Maritimes.

## RFP Timetable - Key Dates

- Issue Date of RFP: March 3, 2025
- Deadline for Questions: March 17, 2025
- Deadline Date and Time: March 28, 2025 (4:00pm AST)
- Anticipated Ranking of Proponents: April 4, 2025
- Anticipated Execution of Agreement: April 11, 2025

The RFP timetable is tentative only and may be changed by United Way Maritimes at any time.

## Submission of Proposals

Proposals must be submitted electronically by sending the file(s) to: Deborah Page at [deborah.page@unitedwaymaritimes.ca](mailto:deborah.page@unitedwaymaritimes.ca).

Proposals must be submitted to the email address set out above on or before the Submission Deadline. Proposals submitted after the Submission Deadline will be declined. The determination of whether the proposal is delivered by the Submission Deadline shall be based on the electronic time and date stamp generated by United Way Maritimes’ email server. Respondents will receive notification of submission delivery – this will act as proof of submission. Respondents who do not receive this notification should seek clarification (please, check your junk folder first).

## Submission Details

- Submission subject lines to read only “UWM\_003\_2025”
- Submissions should be sent in one email, if possible, and be less than 35 MB in size. Respondents whose submissions exceed their internet service delivery limits may send their emails in multiple parts. Respondents who split submissions into multiple emails should indicate this in the opening line of their email’s first subject. For example, “Email 1 of 2 UWM\_003\_2025” followed by “Email 2 of 2 UWM\_003\_2025.” Respondents should make every effort to minimize submission file sizes.
- Submissions must be in Adobe PDF, Microsoft Word, and/or Microsoft Excel format (unless otherwise indicated or approved by United Way Maritimes); and
- Submissions may be Zipped.

Proponents may amend their proposals prior to the Submission Deadline by submitting the amendment in the same prescribed format. Any amendment(s) should clearly indicate which part of the proposal the amendment is intended to amend or replace.

At any time throughout the RFP process until the execution of a written agreement for provision of the Deliverables, a Proponent may withdraw a submitted proposal. To withdraw a proposal, a notice of withdrawal must be sent to the RFP Contact and must be signed by an authorized representative of the Proponent.

## Communication after Issuance of RFP

All United Way Maritimes RFPs will be posted on one or more of United Way Maritimes’ existing websites for a minimum of two business weeks. Additionally, all RFPs will be promoted publicly via social media channels a minimum of once during its posting period.

Respondents shall promptly examine all the documents comprising this RFP, and (a) shall report any errors, omissions, or ambiguities; and (b) may direct questions or seek additional information in writing by email to the RFP Contact on or before the Deadline for Questions. It is the responsibility of the respondent to seek clarification on any matter it considers to be unclear.

If United Way Maritimes, for any reason, determines that it is necessary to provide additional information relating to this RFP, such information will be communicated to all Proponents by addendum. Each addendum forms an integral part of this RFP and may contain important information, including significant changes to this RFP. Proponents are responsible for obtaining all addenda issued by United Way Maritimes.

## Organizational Background

United Way Maritimes is a donor-funded regional impact organization with dedicated local teams serving Central and Southwestern New Brunswick, Prince Edward Island, and Mainland Nova Scotia. We bring together donors, volunteers, business, community organizations, and government to create lasting social change by providing funding, creating solutions, partnering with others, and advocating for change.

Effective July 1, 2024, seven United Way organizations across the Maritimes unified into a single entity after the Boards of Directors and memberships of United Way Central New Brunswick, United Way of Colchester County, United Way Halifax, United Way of Lunenburg

County, United Way of Pictou County, United Way of PEI, and United Way Saint John, Kings & Charlotte passed resolutions to legally merge into one organization.

The unification allows for sharing of knowledge, scaling great ideas and programs, combining strategy and fundraising partnerships, and streamlining operations. These changes maximize staff time and talent so the collective team can spend more time proactively building relationships and creating new opportunities in communities across the region.

Local impact remains a key commitment in the new organization. Funds raised in each United Way community will be invested locally, and decisions to invest in organizations and programs and develop partnerships will continue to be led by local knowledge. Senior staff and volunteer presence also remains strong in each geographic location.

As persistent social issues like poverty, food insecurity, and the housing crisis continue to grow, United Way organizations are taking on increasing responsibility for creating solutions. This often requires an increase in investment and in philanthropic partnerships, as well as robust infrastructure and capabilities which are easier to develop and grow through combining our collective resources.

United Way Maritimes will be better positioned to strengthen local impact and relationship building, share data, results and programming to grow community impact, and implement new systems and technologies, like customer relationship management and fundraising platforms, more effectively and at less cost.

Functional areas such as finance and accounting, marketing and communications, and governance and human resources now have dedicated regional teams to serve all the geographic areas uniting, allowing for more efficient use of resources and elimination of duplication of efforts. Dedicated strategic planning and forecasting in the areas of revenue growth and diversification, fundraising, business development, and community impact will also support the wider Maritime entity, better supporting those on-the-ground actively meeting community needs. Additionally, in recognition of the growing need from a housing perspective, the new entity has an Affordable Housing division with several active projects underway across the region. More information is available at [www.unitedwaymaritimes.ca](http://www.unitedwaymaritimes.ca)

## **Current Organizational Environment**

United Way Maritimes currently employs approximately 55 full-time employees located in seven separate office locations across three provinces (Nova Scotia, New Brunswick & PEI) in a hybrid (remote & in-person) working environment.

## **Goal of Project**

Have one highly functional website that hosts all funding programs, financial and impact reporting, community projects (such as housing communities), and ways in which United Way Maritimes supports all of its communities, while prioritizing donor navigation and facilitation. Visitors will be able to navigate the single website by choosing their own path, by one of seven individual geographic locations, by province, by region, or by specific area of community impact. The site will be a platform for storytelling, accessing funding, making donations, learning about sector capacity programs, and understanding our organization.

Please note: United Way Maritimes will be undergoing a parallel branding journey by building on the strong existing brand recognition – while also helping to transfer the trust of the local United Ways to the new and United Way Maritimes brand.

## RFP Deliverables

### Scope of Work:

The scope of the work for this project will include:

- Developing and designing a user-friendly human-focused website that reflects United Way Maritimes' mission, values, and programs that utilizes creative design elements to help guide visitors, encourage donations, and bring story-telling aspects to life:
  - Allow users to easily navigate and allow the public to access the information how they choose, i.e. by office location, province, by region, areas of impact in a choose-your-own-adventure navigation style
  - Prioritize the customer experience while maximizing donations with features such as: allowing them to choose which geographic location for their donation, defaults to recurring donations, covering transaction fees, ideal donation amount callouts, before you go prompts, etc. (currently testing a new, single donation page that leverages the Formidable Forms plugin. Depending on effectiveness we may need either an upgrade on functionality or a new tool)
  - Provide the opportunity on the new website to highlight more storytelling with digestible content blocks and stronger utilization of infographics and video to tell the story of the organization's services, work, and impact
- Recommending hosting solution: We are still determining how we would like to handle hosting and maintenance. Please, note we are currently hosted on HostPapa premium plan and have IT capability within the organization and want Proponent to work with that staff member to determine the best hosting solution
- Completing a content audit and supporting the selection of existing content for migration to help us accomplish our goal
- Guiding the exercise to create a new site map, navigation paths, and flow to sift and select relevant content of seven separate United Way websites + one micro site into one cohesive website to serve all United Way Maritime locations, now and in the future.
- Helping to determine the ideal user paths to enable navigation of site content by office location, province, region, and areas of impact in a choose-your-own-adventure navigation style
- Recommending highly functional tools that can be incorporated into website that:
  - Accept and manage registrations for training programs
  - Support funding process through an intuitive portal to collect applications, manage communication, provide financial and impact reporting capabilities for funded agencies and United Way staff, similar to [Apply](#)
  - Provide Canadian-based storage of data (required)
- Recommending a website content management system / interface that:
  - Is user-friendly so staff have as much access as possible to update and build out new features, as needed – build staff training into projected hours
  - Allows the ability to expand the website to add new locations, new initiatives, and new projects later
  - Preference to Canadian-based option
- Overseeing the initial population of selected content

- Implementing keyword research and SEO best practices to improve website visibility and ranking on search engines
- Setting up Google Tag Manager and GA4 instance for the new site - please, indicate what kind of integration you use/have and whether it can track donations, and where potential donors drop off, etc., like an e-commerce site
- Training staff on selected content management system / interface
- Following industry standards for website security and accessibility
- Monitoring website performance and addressing any technical issues that arise
- Providing regular analytics reports on website traffic and performance

### Features & Functionality:

- Ability to process donations / integration with chosen donation tool
- Integrates with existing SaaS tools:
  - Formidable donation platform (still early in use, depending on effectiveness we may need either an upgrade on functionality or a new tool)
  - Yardi
  - Salesforce / future CRM
- Languages (seeking recommendation for best and most cost-effective approach to bilingual site, FR / EN)
- GA4 integration that allows tracking of donations, and where potential donors drop off, etc., like an e-commerce site
- Blog
- Job and RFP / RFQ postings with ability to add in addendums
- Public-facing report / document database (i.e., for procurement)
- Internal site search
- SEO plug-ins and development related element
- Custom forms:
  - Contact us (what's involved in having a chatbot to help users to find / search information, and if possible, to connect a real person right away)
  - Volunteer Intake / Interest
  - Funding applications
- Subscription signups (MailChimp) with option to select some or all available options
- Option to create and host a web-based annual report
- Provide reviews on training programs (like Amazon reviews)
- Tool that allows funded agencies (for free) and other non-profits (paid) to match needs for goods, i.e. [www.Giveforgood.ca](http://www.Giveforgood.ca)
- Re-directs from the old sites to the new site required to help with the transition, timeframe to be determined
- Mobile responsiveness and accessibility compliance
- Compliant with relevant privacy regulations
- Follow industry standards for website security
- Ensure meets, or exceeds, industry standards for accessibility

Note: The eight individual sites that will be integrated into the new site include:

- [www.unitedwaycentral.com](http://www.unitedwaycentral.com)
- [www.unitedwaycolchester.ca](http://www.unitedwaycolchester.ca)
- [www.unitedwayhalifax.ca](http://www.unitedwayhalifax.ca)
- [www.lunenburgcounty.unitedway.ca](http://www.lunenburgcounty.unitedway.ca)
- [www.peiunitedway.com](http://www.peiunitedway.com)

- <https://pictoucountyunitedway.ca>
- <https://unitedwaysaintjohn.com>
- [www.unitedwaymaritimes.ca](http://www.unitedwaymaritimes.ca) (micro site)

## Evaluation and Proponent Ranking

All proposals and quotes received in response to RFPs will be evaluated and ranked following the process outlined below:

A cross-functional team of staff from United Way Maritimes, consisting of a minimum of three and a maximum of five members, will evaluate each proposal against the stated criteria. The following sets out the categories, weightings, and descriptions of the rated criteria of the RFP. Proponents are asked to include in their proposal the information that is requested in each of the areas listed in this section. The Proponent responses will be rated (i.e., scored) based on how well the response addresses the rated criteria stated below.

### Rated Criteria Category Weighting (Points)

- Experience & Qualifications: 25 points
- Service Delivery Model: 15 points
- References: 15 points
- Finance / Pricing: 40 points
- Bonus Criteria: 5 points
- Total Points: 100 points

## Proposal Requirements

### Experience & Qualifications – 25 points

Provider's experience and the qualifications of their team as it relates to the scope of work identified.

Provide company background and brief overview of firm's web development experience, which might include number of years the service has been offered, how many clients served, the types of clients served, and what might set the service apart from similar services provided by other firms. Please, briefly outline the consultants who would be assigned to this project and their relevant experience, including list of certifications and qualifications of technical staff, and any subcontractors, if applicable.

Also provide:

- Availability of support services (hours and days of operation)
- Unique selling propositions or differentiators

Preference to a firm who has in the past helped lead a similar and successful process of combining multiple locations / sites into one. Would also prefer those highly successful in fundraising within a non-profit environment. Please, also include examples of your website work that highlights storytelling.



## **Service Delivery Model - 15 points**

Brief description of your creative and website development process and the timeline that will be followed to meet our timeline of having the new website operational in fiscal 2025/26 as it relates to the scope of work identified. Please, provide a transitional plan for moving to the new website and ongoing maintenance model.

Please, outline your overall service delivery model including how website updates and support requests will be managed.

## **References – 15 points**

Please, provide three references who have used web development services from your firm within the last two years, preferably for a similar scope and type of project.

## **Finance / Pricing – 40 points**

Please, provide an itemized budget for the service, including any hard costs required. Please, indicate if you are proposing to provide charitable rates.

Please also provide, separately from the budget for the scope of work described, ongoing website development and maintenance services, updates to ensure website security, functionality, and content accuracy, and volume discounts or package pricing options. Any additional costs (i.e., emergency support, extra features).

Finance / Price evaluation will be scored based on each Proponent receiving a percentage of the total possible points allocated to price, which will be calculated in accordance with the following formula:  $\text{lowest Proponent price} \div \text{Proponent's price} \times \text{weighting} = \text{Proponent's pricing points}$

## **Bonus – 5 points**

In keeping with United Way's stated organizational values focused on equity, an additional 5 points will be added to a Proponent proposal should the Proponent be owned or operated by a member of a historically racialized or marginalized community.

After the completion of evaluation, all scores will be added together, and the Proponents will be ranked based on their total scores. The top-ranked Proponent will receive a written invitation to enter direct contract negotiations to finalize the agreement with United Way Maritimes.

## **Notification and Debriefing**

Once an agreement is executed by United Way Maritimes and a Proponent, the other Proponents will be notified directly in writing as to the outcome of the procurement process. Proponents may request a debriefing after receipt of a notification of the outcome of the procurement process. All requests must be in writing to the RFP Contact and must be made within thirty (30) days of such notification.

The RFP Contact will contact the Proponent's representative to schedule the debriefing. Debriefings may occur in person at a United Way Maritimes office location or by way of conference call or other remote meeting format as prescribed by United Way Maritimes.

## **Confidential Information**

### **Confidential Information of United Way Maritimes**

All information provided by or obtained from United Way Maritimes in any form in connection with this RFP either before or after the issuance of this RFP:

- is the sole property of United Way Maritimes and must be treated as confidential
- is not to be used for any purpose other than replying to this RFP and the performance of any subsequent contract for the Deliverables
- must not be disclosed without prior written authorization from United Way Maritimes, and
- must be returned by the Proponent to United Way Maritimes immediately upon the request of United Way Maritimes

### **Confidential Information of Proponent**

A Proponent should identify any information in its proposal, or any accompanying documentation supplied in confidence for which confidentiality is to be maintained by United Way Maritimes. The confidentiality of such information will be maintained by United Way Maritimes, except as otherwise required by law or by order of a court or tribunal. Proponents are advised that their proposals will, as necessary, be disclosed, on a confidential basis, to advisers retained by United Way Maritimes to advise or assist with the RFP process, including the evaluation of proposals. If a Proponent has any questions about the collection and use of personal information pursuant to this RFP, questions are to be submitted to the RFP Contact.

## **Cancellation**

United Way Maritimes may cancel or amend the RFP process without liability at any time.