



# TECHNOLOGY WEBSITE PLATFORM AND REDESIGN PROJECT

## REQUEST FOR PROPOSAL (RFP)

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# 1. INTRODUCTION

## 1.1 ABOUT THE PRI

The UN-supported Principles for Responsible Investment (PRI) is the world's leading proponent of responsible investment. The PRI works to understand the investment implications of environmental, social and governance (ESG) factors and support an international network of investor signatories in incorporating these factors into their investment and ownership decisions.

The PRI is a global membership organisation that has grown significantly since it was founded in 2006 by a small group of investors in partnership with the UN Global Compact and UNEP Finance Initiative. Today there are more than 5,000 signatories in over eighty countries and responsible investment has entered the mainstream. Following a period of rapid growth, the aim of the current phase of development is to strengthen value across the diverse and global membership base, operate at scale, deepen understanding of the signatories, transform digital reach, develop staff members, and build a truly global organisation.

The PRI Association is a company limited by guarantee, incorporated in England and Wales, which is governed by the PRI Association Board (the board) as set out in the Articles of Association of PRI Association. The PRI Association has several corporate subsidiaries: PRI Enterprises Ltd (UK); PRI US Inc (Delaware, U.S.); Canadian Branch office; PRI Association (Hong Kong) Ltd; Representative Office (Beijing, China); and PRI Association France SARL. The external auditors for the PRI Association are Deloitte LLP, appointed in 2021.

The PRI is funded primarily via an annual membership fee payable by all signatories. Additional funding comes from grants from governments, foundations and other international organisations. Total income was £26.8m in the 2021/22 financial year. The PRI has c.250 employees today, located around the globe, with 74% in the London, UK, headquarters.

The PRI Association is not regulated as a financial services organisation in the UK or elsewhere. The PRI has over 5,000 signatories, or members, and most of these signatories are regulated as part of the financial services industry.

## 1.2 REQUEST REVIEW

The PRI Association is inviting Requests for Proposals from company (vendor) to build a new website platform and redesign our website ([www.unpri.org](http://www.unpri.org)) because our current website is no longer suitable to achieve our business objectives. Our aim is to build a modern online presence, compelling with responsive web design that showcase our mission and values to our audience. It should encompass scalable technological advancement, resilient CMS platform with enhanced metadata driven architecture, user-centric with highly seamless secured access, and enhanced integration capabilities across our technology landscape.

We are seeking proposals from highly qualified, experienced technology and website solution provider with proven track record in delivering a complex transformation of the technology website platform, ideally with expertise in both the financial services industry and not-for-profit sectors. The ideal

provider will work as our strategic partner to design, deliver and implement our website platform that aligns with our technology strategy roadmap. The chosen strategic partner must have demonstrated as a reputable global technology solution provider, positive customer satisfaction in project delivery, implementation, support and services, including strategic development roadmap to support our longer-term business growth.

You will need to have deep understanding of website technology stack, building a website platform that integrates seamlessly with CRM and data solutions, strong portfolio of successfully executing a complex project that showcase their ability to reorganise website architecture for optimal information presentation, manage large-scale content migrations, and develop microsites within a cohesive digital ecosystem. We value creativity, technical proficiency, and a collaborative approach to ensure the new website effectively supports our mission and enhances our engagement with our diverse audience of signatories and stakeholders.

## 2. PROJECT REQUIREMENTS

### 2.1 PROJECT OBJECTIVE

The PRI has grown rapidly as an organisation over the years, we recognised that the current website with the associated technology stack is no longer suitable and is limiting out strategic goals.

The PRI has agreed that now is the right time to design a website platform to deliver better experience for our signatories and contributors to PRI. The targeted solution must provide PRI enhanced self-managed capabilities to tailor to our needs and to ensure that it is fit for purpose, effective and enables us to scale exponentially.

The main objectives of the transformation of our new website technology are as follows:

- Develop a user-centric website that offers personalised experiences to signatories, tailored to their unique interests and responsible investment criteria (e.g. signatories can customise and select information that is of interest and relevant).
- Develop and design a balanced effective customer experience (CX) and user experience (UX) journey, provides ease of searching for information, events, initiatives, etc.
- Narrate the PRI's mission through the website, while supporting signatories' responsible investment journey.
- Deploy a user-friendly Content Management System (CMS) that accommodates contributors at all levels of minimal technical expertise.
- Implement the technological capabilities of the CMS to deliver effective lifecycle management of our contents, enabling progression reporting for our signatories that uplift the data from our data Lakehouse.
- Deploy a Single Sign-On (SSO) solution across all PRI platforms with integrated multi-factor authentication (MFA) capabilities, enabling seamless access for our signatories and PRI users.
- Integrate well with CRM solution (e.g. Salesforce, Sage X3) that provides real time data integration to our technology stack.

- Integrate analytics tool to monitor website performance, website traffic, user behaviour, information interest patterns.
- Optimise real time dataflow and synchronisation between our systems (e.g. Reporting tool, Data portal, Collaboration Platform, Initiatives, Policies).
- Provide PRI the capability to self-manage the solution, reducing the need for bespoke development to scale and maintain the solution (adoption of agile development).
- Highly secured, scalable, resilient cloud-based solutions (Azure Cloud) and fully comply to the global information security standards.
- User intuitive, secured, built-in online form for external registration with real-time data integration to our CRM solution e.g. Salesforce
- All resources must be easily accessible and navigate to, using effective metadata driven architecture.
- Recommend an appropriate solution, including project delivery methodology and implementation plan for a multi-year transformation programme.

## 2.2 PROJECT SCOPE

The scope of work encompasses the following:

- Understanding of PRI business model, PRI commitment to our signatories, internal and external audiences, and contributors.
- Understanding PRI existing technology stack alongside the dataflow of different systems, constraints, and the complexity of interconnected solutions.
- Understanding of the current website design, limitations, challenges to scale and maintain
- Perform analysis of the new requirements with various business stakeholders to better understand PRI strategy and commitment to produce a compelling website.
- Collaborate closely throughout the project to ensure accuracy of requirements, as well as partnering with us to develop the user experience (UX) and customer experience (CX) design.
- Recommend a website design that is modern, bold, engaging, intuitive navigation, optimise performance, accessibility, and the conversion rate optimization (CRO) and search engine optimisation (SEO) strategies.
- Recommend an all-encompassing Content Management System (CMS) or Digital Content Management (DAM) that is suitable to our business model and audience, including information review, cleansing and migration.
- Recommend a reliable, flexible, and easy to manage built-in online form that enables seamless data registration from our website and onto our CRM solution.
- Recommend technology stack options with secured, scalable, resilient, integrates well with our CRM and data solution, seamless dataflow across our systems, and highly flexible for our web developers to manage with access controls as required.
- Recommend a comprehensive transformation and migration approach for a new website with a unified hosted platform that delivers the modernisation journey for our business growth.
- Programme management and business analysis delivery from initiation to implementation, technical training and documentations.

Estimated budget: £400K

## 2.3 TARGET AUDIENCE

We have a global audience of:

- Our signatories (Asset Owners, Investment Managers, Service Providers)
- Potential signatories
- Academic researchers
- Responsible Investment stakeholders, including regulating bodies, affiliated organisations and non-signatory investment professionals and investment related organisations
- Responsible Investment and ESG press and media

## 3. RESPONSE PROCESS

### 3.1 NOTIFICATION OF INTENT TO RESPOND

Please indicate your intention to respond to this RFP by email to the Primary RFP contact listed below by the *Intent to Respond and Questions Due* date outlined below. We ask that you provide contact of the individual responsible for coordinating your RFP response.

#### Primary RFP Contact

For any further clarifications and to submit proposals, please email [Jeannie.Bowman@unpri.org](mailto:Jeannie.Bowman@unpri.org)

### 3.2 RESPONSE DELIVERY INSTRUCTIONS

Your company must respond to this RFP in writing with a version of any master service agreement or contract that would be utilised if selected. In addition, you may attach documentation to support your answers if necessary.

Please submit all responses via email no later than **12 August 2024** to [Jeannie.Bowman@unpri.org](mailto:Jeannie.Bowman@unpri.org)

Any response received after the delivery date specified, will not be considered without prior written approval.

## 4. SELECTION CRITERIA PROCESS

PRI Association intends to conduct a comprehensive, fair, and impartial evaluation of proposals received in response to this RFP. All submitted proposals will be evaluated using the evaluation criteria listed below.

### 4.1 KEY QUESTIONS

Please provide answers to the following questions, limiting your response to each question to **five hundred words**. You may provide supporting documents in an Appendix.

1. What expertise does your organisation have in delivering the website transformational project specifically referring to website redesign and the technology stack described in the project requirements section above?
2. What knowledge and expertise does your organisation have on technology website redevelopment and redesign for other relevant organisations, especially for not-for-profit organisations that operate within financial services?
3. What is your organisation's business relationship model with the recommended solution provider, such as the global support model, solution expertise, product pricing and development roadmap.
4. Provide a comprehensive description of your approach to fulfilling the requirements of the RFP.
5. Provide a detailed recommendation on the schedule for completing the website redesign, including timescales for the full transformation and migration of the project.
6. What is the total fee that your organisation proposes for this project, providing as much detail as possible?
7. Confirm what level of input (documentation / resource time) you envisage required from PRI with relevance of risk, issues, and assumptions.
8. Please indicate the expected resourcing, experience, and expertise of the resourcing that you envisage required for the project.
9. Please include your customer-centric approach to enable the long-term innovation partnership with PRI, an assurance as a potential global strategic supplier.
10. Identify the nature of any potential conflict of interest the individual or firm might have in as a strategic partner for this project and PRI growth.

### 4.2 SELECTION CRITERIA AND PROCESS

The applicants will be judged on technological advancement expertise, value for money, on the level of creativity, global supplier differentiation, company global performance, after sales support service as well as our strategic partnership.

- Company profile with contact details, and website.
- Company performance, experience, and expertise
- Demonstrated global customer service quality and the support model.
- Completeness of solution, product portfolio and the strategic development roadmap.
- Pricing structure, covering from project to implementation, support, and maintenance.
- Top 5 clients and references, and the duration of partnership.

- 5-8 of similar projects with links to case studies and their websites.
- The project management approach with the estimated timeline from project inception to completion

The proposal must include all the answers to the questions and with any other relevant information that benefits the overall response to this RFP.

### 4.3 CONTRACT REVIEW AND AWARD

The shortlisted vendors will be invited for a presentation at PRI office, to demonstrate the proposed solution, product features alongside the technical expertise delivering the project outcomes.

PRI will perform an internal supplier qualification upon completion of all the proposal and the demonstration by the shortlisted vendors. The successful vendor will be notified accordingly and is required to provide the terms and conditions of the contract within 10 business days upon receipt of the notification. A contract discussion will take place within a reasonable time as determined by PRI Association, and it can be terminated if it cannot be successfully established within the stipulated time.

All vendors submitting the RFP will be notified in writing of the decision, and if an award is made. The award shall be deemed to have been made upon completion of the contract negotiation and contract is signed and approved by PRI Association.

Vendors must provide information of all pending or threatened litigation, administrative or regulatory proceedings or similar matters. The successful vendor shall have a continuing obligation to disclose any such actions during the period of this RFP process and any contract resulting from this RFP.

PRI Association reserves the right to execute any of the following options:

- Issue no contract award for any of the services described within this RFP.
- Issue contract awards for a combination of services or part of where PRI Association sees fit.
- Award all services to one vendor or multiple vendors.
- PRI Association is not obligated to accept the lowest price or most technological advanced proposal.
- PRI Association has not obligation to reveal the basis of the contract award or to provide any information to the vendors to the evaluation or decision-making process.



## 4.4 RESPONSE TIMELINE

Project Timeline Dates	
RFP Issue Date	29 July 2024
Intent to Response & Questions Due *Vendors asking questions / clarifications to complete before the due date	2 August 2024
Proposal Submission Due	12 August 2024
Response / Vendors Selection	15 August 2024
Vendors Presentations	26 – 29 August 2024
Vendor Selection / Award Contract	6 September 2024
Anticipated Website Launch	Early February 2025

### Deadline for submission

The deadline for submissions is **17:00 GMT, 12 August 2024**.

It is envisaged that the strategic provider will be appointed in August, after a selection of three shortlisted providers with the PRI Executive team during the weeks commencing 2 September 2024.

# APPENDIX 1: KEY FEATURES DESCRIPTION

- **Website Design and Development:** Create a modern, responsive website that reflects the PRI's brand and mission, offering personalised user experiences based on signatories' interests and investment requirements.
- **Content Management System (CMS) Implementation:** Robust and easy-to-use CMS to allow contributors of varying technical levels to manage content effectively with capabilities on life-cycle management policies and integration to our data Lakehouse.
- **CRM Integration:** Seamlessly integrate the website with Salesforce CRM with full data synchronisation that ease user profiles management and personalise user experiences based on their interactions and preferences.
- **Single Sign-On (SSO) Implementation:** Develop and implement a Single Sign-On solution to allow users to access all PRI platforms with one set of credentials, enhancing security and user convenience.
- **User Experience (UX) Design:** Focus on creating intuitive navigation and a user-friendly interface to ensure the website supports the responsible investment journeys of its signatories.
- **Customer Experience (UX) Design:** Focus on creating customer's interactions with our website, the published information and various business touchpoints to get involved with PRI.
- **Storytelling and Content Strategy:** Craft a content strategy that effectively tells the PRI's story, communicates its values, and engages signatories in their responsible investment journey.
- **Security and Compliance:** Ensure the website meets all relevant security standards and data protection regulations, including GDPR, to protect user information and privacy.
- **Testing and Quality Assurance:** Conduct comprehensive testing across all aspects of the website, including functionality, usability, security, and performance, to ensure a flawless user experience. All test materials are to be provided to PRI upon completing, along with any necessary handover.
- **Training and Support:** Provide training for PRI staff and contributors on using the CMS and managing the website, along with ongoing support to address any issues or updates and deliver comprehensive documentation of the solution.
- **Launch and Post-Launch Evaluation:** Successfully launch the new website and conduct a post-launch evaluation to gather feedback, assess user engagement, and identify areas for future improvement.
- **Mobile-friendly design:** Design to work seamlessly on mobile devices.
- **Solution scalability:** Enables PRI to design, maintain and scale as the business grow, and with minimal dependencies on external development where possible, cloud-based (AWS/Azure), and with high availability and resiliency to support global audience.
- **Solution enhanced security:** Ability to implement security tools, backend multi-factor authentication (MFA), access control, audit trails, system reporting, logging, alerting, and monitoring capabilities.
- **Seamless data integration architecture:** Ease of connecting different software for data passthrough from various sources, including system login authentication. Ability to present real-time data where appropriate.
- **Future features:** AI capabilities; web development, machine learning attributes, augmented and virtual reality.

# APPENDIX 2: CURRENT SIZING AND COMPLEXITIES

The migration and development project for the PRI's new website involves several critical dimensions and complexities, as detailed below:

1. **Content Migration Volume:** The project entails the migration of approximately 17,000 web pages, encompassing a wide spectrum from basic article pages to pages containing rich media and some custom functionality contained in custom scripts. This extensive volume necessitates a robust and systematic approach to ensure a seamless transition.
2. **Document and Media Migration:** The website hosts around 16,438 documents, including 10,257 images, 5,647 files, 419 videos, and 115 audio files. Migrating this vast array of media requires careful planning to preserve data integrity, ensure compatibility with the new CMS, and optimize for web performance.
3. **User Data Integration:** With 22,000 registered users in Salesforce, migrating and integrating this user data into the new website to enable personalised user journeys adds a layer of complexity. This process must ensure data security, accuracy, and compliance with privacy regulations.
4. **Annual Report Microsites:** The development and integration of annual report microsites within the new CMS framework demand attention. These microsites require distinct design and functionality considerations.
5. **SSO Functionality Replacement:** Replacing the existing SSO functionality with a new solution across the PRI's web platforms involves intricate technical integration. This transition must be managed with care to maintain user access continuity, security protocols, and system interoperability.
6. **Website Architecture Reorganisation:** The objective to reorganise the website architecture aims to optimise information presentation. This involves a strategic overhaul of the site's structure, navigation, and content organisation to enhance usability, accessibility, and engagement. In parallel, to improve integration, simplify development, reduce maintenance overhead, enhanced scalability and reliability to cater to our global users and incorporate modern front-end frameworks for dynamic and responsive experience.
7. **SEO and Link Integrity:** Migrating such a significant volume of pages and documents requires a focused strategy to preserve SEO value and link integrity. Implementing redirects, updating meta information, and ensuring URL consistency will be key to maintaining search engine rankings and user access.
8. **Data Management and CRM Integration:** Integrating user data with Salesforce CRM and managing the migration of document assets requires sophisticated data mapping and synchronisation processes to ensure that user experiences are personalised, and data is utilised effectively across platforms.
9. **Technical and Functional Testing:** Given the complexity of integrating various content types, user data, and new functionalities, comprehensive technical and functional testing is critical. This includes validating the migration of media assets, user data accuracy, and the functionality of the new SSO solution.
10. **Change Management and Training:** The shift to a new website architecture and CMS, coupled with the introduction of new functionalities like SSO, necessitates effective change management.

Training for content managers, technical staff, and stakeholders on the new system's operations will be essential to ensure smooth adoption and ongoing management.

Addressing these complexities requires a meticulously planned approach, leveraging cross-functional collaboration, advanced technical solutions, and ongoing stakeholder engagement to ensure the project's success while minimising disruption to users and maintaining the integrity of the PRI's digital presence.