ODI website design and development
Invitation to tender

Document Outline

1. Intro

2022 marked 10 years since the Open Data Institute was founded by Sir Tim Berners-Lee and Sir Nigel Shadbolt. In February 2023 we launched our new 5-Year Strategy. Key aspects of this strategy include our commitment to reaching many more people in new markets, and redesigning our business model, giving us access to more diverse revenue streams. You can read the strategy [here](#) and more about the impact the ODI has had over ten years [here](#). In the next five years, we want our business - and our impact - to grow. The website is an important element - it is our shop window for products, services, membership, training, and thought leadership.

We are looking for agencies to submit proposals for the design and build of a new website, that considers the following key factors:

1. To be a **smart digital solution** based on a new membership programme and customised to support users with new products, learning tools and paywall content.
2. To **focus on core audiences** and the ODI value proposition, presenting the institute as a 'thought leader' and guiding users to relevant content.
3. To be a shop window, where people can easily access our **free content** and products and **purchase our paid-for products and services**.
4. To become a **knowledge hub** that retains the depth and breadth of content on the existing website, and provides a robust structure for future content (reports, blogs etc) created by the ODI .
5. To be **easily navigable and searchable,** supporting key customer journeys.
6. To be a **scalable 'digital product'** that strengthens over time - based on the insights it gives us about users, customer journeys and performance of different types of products and content.
7. To be a tool to **help understand our audiences**, and audience behaviour, better. We want to be able to understand audience needs and wants to inform continuous improvement.
8. To be a trustworthy and secure website with the highest possible standard of cyber protection.

2. Background

2.1 Research findings and key challenges

In 2022 the ODI assessed the current website, commissioning user research (including customer interviews and usability testing) that identified the following key issues to be addressed:

Proposition and branding

1. Users are unable to understand what kind of organisation the ODI is, and how the ODI can help with their needs, challenges and interests.
    a. The ODI's proposition is not clear on the website. Often users find it hard to understand how the ODI can support them, what needs the ODI is ready to meet.
    b. There is no clear customer/audience journey for those who are new to the ODI.
    c. There is a lack of tailored journeys aimed at different user types.
    d. Current information and site functions are not aligned to the ODI's core audiences, their needs and wants.
    e. Current site does not provide feedback loops that can inform audience understanding, programmatic development, and strategic initiatives.
    f. Search is poor.
2. Audience understanding of the ODI, after visiting the website, is still incorrect.
    a. Messaging and journeys are not clear. Users often come to our site not knowing what they want, so accessing relevant information without clear signposting can be hard.
    b. Some users think we have data sets, and provide access to those, based on our name and reference to open data.
    c. The ODI's proposition is not clear on the homepage, and the About page is very text-heavy.
3. There is no single sign-on for our customers/members.

Contents and services

1. Users are unable to find ODI projects and content relating to their industry and interest. There is no clear structure and taxonomy of content across the site.
    a. Abundance of reports, case studies and projects listed, but no way to filter or sort them.

2. Users are unsure what service/support is suitable for them.
    a. There is a lack of clarity around how the ODI's services work and what potential customers will get out of them.

Membership

3. It's challenging for users to understand different membership options and they are therefore hesitant about membership and partnership opportunities.
    a. They struggle to quantify the value of the membership.
    b. They are unsure what a partnership would involve.

NOTE: The above is a selection of the key findings of the research activity. The ODI expects the winning agency to build user journeys based on the more detailed insights and additional market research into our customers, markets and competitors - all of which was carried out in 2022. The complete documentation will be shared with the winning bidder to be used as a foundation for the design phase. We also have stakeholders who would be available for user journey research and testing. The ODI would make the arrangements for these sessions, with the successful agency running them.

2.2 Target audience and key users

Target audience
The table below gives an overview of our target audience, present and future.

Current focus	Future strategy
- Policy– work in government (foreign, national and local), civil servants and policymakers - Private & public sector - Public/communities - Philanthropic organisations - Thinks tanks - Technical journalists	- Funders - Customers - International data advocacy - Education (researchers) - Trade institutions - Health (pharmaceuticals) - Private sector - Energy - Finance - Retail - Travel & transport - Smart cities - General public

Editorial team
The content on the current website is kept up-to-date by the ODI communications team led by the Head of Communications using the Wordpress CMS. This includes:

- Blogs (weekly basis)
- Reports (monthly basis)
- Products and services (monthly basis)

Note: The ODI Learning Team frequently accesses the CMS to maintain the courses and training sections.

2.3 Current website structure

The current website is structured around the following sections:

1. Homepage

2. Knowledge & Opinion
Guides, Reports, News, Blogs, Case Studies, Podcasts and Research. Currently, these are scattered across the site and difficult to find.
KEY FEATURES:
- Subscribe to our Newsletter (The Week in Data) and access past issues.
- Ability to embed third-party components (e.g. Vimeo, Soundcloud, Spreaker).

3. Projects & Services
Projects, Consultancy services, Membership info, Initiatives and R&D activities.
KEY FEATURES:
- Ability to subscribe and pay for a membership (currently happens using Maxio/Chargify, with payment taken via Stripe, and record saved in Hubspot).

4. Events
Talks, Webinars, Members events, and archive of previous events.
KEY FEATURES:
- Ability to buy tickets for events (we currently use Eventbrite).

5. Courses & Training
Our catalogue of courses.
KEY FEATURES:
- Ability to submit forms, subscribe to courses, and buy training.

6. Our Community
Lists of partners, trainers, and members leading to individual profile pages.

7. About the ODI
Our strategy, Team, Contacts, Jobs vacancies, and Annual Reports.

Please consider this list as an overview of the main sections included in the current website but not, in all likelihood, the sections for the new site. The ODI expects the definition of a new website map, contents hierarchy and more effective navigation to be part of the design phase.

2.4 Current tech stack

Our current website is built on WordPress and hosted by WP Engine. Our CRM is Hubspot. Users currently sign up or register for activities/membership in a number of ways. Users register their interest in future events via Hubspot. Event sign-ups are through Eventbrite, and we host our annual summit in Hopin. Membership processing is through Chargify/Maxio, with payment taken through Stripe. Invoice payment requests are generated in Maxio as well. Records are then updated in Hubspot.

Our training and courses are listed on a separate website, built in Hubspot. Users register interest for training via a form in Hubspot, Eventbrite captures the booking. The training is delivered in Moodle. Auto-enrolments and payments for self-paced courses are captured through Spark, the Moodle e-commerce integration. [This diagram maps all existing connections to the website](#).

With regards the current website, the WordPress database acts as the CMS, storing blogs, news, events, people, products and services, network and other key knowledge resources such as reports and podcasts. We have identified around 3,000 pieces of content (plus 3,000+ media attachments) managed in the WordPress database. Additionally, each piece of content is tagged and also connected to other content, for example, people are associated with events, news, topics and services and news with events, people etc. This means that the data model is a network of many to many relationships that allows the navigation through the current website via connected cards (for posts) and navigation elements (for topics). Our website acts as a knowledge base as well as being the place for people to explore what we do and purchase services. As we are an institute, we share our knowledge with others who link into our pages, be it news, reports, podcasts or other content. As such the any updates to the website MUST preserve access to current content via the same URLs and not result in any 404s. This will be the third transition of the website and there is also a redirection database of links from the old website that must also be preserved.

We are cautious about tendering for a new monologic solution such as WordPress which provides both the CMS and front end website. Being the Open Data Institute we are looking to move to a more loosely connected set of components where the management of content and database can be separated from the ways the content is being reused and displayed on services such as the website. We view our main website as just one (and most important) way that our products, services and content can be discovered and reused.

We have a number of microsites associated with the ODI, but these are project-specific and host e.g. tools for particular work streams. These are not in the scope for this project.

We invite tenders to suggest a tech solution that better meets our goals, integrates with our existing estate and requirements, providing a more seamless experience to users.

2.5 Website stats

The current ODI website launched in 2017 on the WordPress platform. According to Google Analytics, in 2022, we had 303k sessions, 220k users sessions, 574k page views across the year. The bounce rate for the year was 72% and the average session time was 1 min 35 seconds. 69% of visitors are new to the site with 31% returning visitors. We see a spike in traffic in November each year which coincides with the ODI Summit event.
We expect to see traffic increase to at least 500,000 sessions per year as we grow our membership and product offerings. Most users are from the UK (38%) followed by the USA (14%), followed by India (3.8%), Germany (3.7%) and Canada (2.7%). Although one of our goals is to diversify our markets and our audiences, and to attract more interest from countries outside the UK and Europe.

3. Project objectives

Based on the research findings and the ODI strategy, here follows an outline of the goals to be achieved with the launch of a new website.

- **We want to make sure the website is properly designed for the target market** We want our core audiences to understand how they can engage with the ODI across different areas of work. We have research on our audience (customers, competitors and markets)which is available as a resource, and stakeholders who would be available for user sessions and testing. The ODI would recruit these stakeholders.
- **We want the website to provide tailored journeys** that signpost users to relevant content, to enable users to easily find what they need. We want to identify repeat users and present specific content.
- **We want to increase membership subscriptions** by providing more detail about the benefits of becoming a member or partner and provide user journeys that enable members to navigate additional services, and apply discounts attached to their specific membership
- We want users to be able to **purchase and administer membership subscriptions** through the website. Our revenue from membership in 2022 was £130k. We want to grow this to £600k per year by 2025. We want a system that enables us to access the number of members, who has paid etc. it should also integrate with Hubspot.
- We want members to be able to **access members-only content** behind a gating function.
- We want single sign on for our customers.
- We want users to be able to purchase our **products and services** through the website (i.e advisory services, workshops, courses, specific training, etc). Work to define these products and services packages is ongoing, with the intention of having clearly defined 'product stacks' ready for the website launch.

- We want users to be able to purchase **training and courses**, and for members to be able to use their discounts on training and courses.
- Members receive discounts on products and events. We want their discount to be applied when purchasing items.
- We want to **administer memberships** through the website.
- **We want the website to be absolutely secure and reliable and compliant with the most recent standards of web security and data protection. The importance of security is not to be underestimated.**
- We have over a decade of experience, and lots of research and reports. We want the work that is currently **open and available** to everybody to remain so, and effectively be organised in a fully explorable archive.
- We want to showcase our work and the impact we have created. Copy and content will be produced by the ODI (blogs, events, case studies, project pages, products and services, videos and podcasts to embed), but we want user journeys that improve engagement. We want to see our bounce rate drop by 10% within the first six months of the new site launch.
- We want to ethically and transparently understand our users.

Table showing products and related integrations

Item	Frequency	Audience	Discount?	Integration
Membership	One-off and recurring	Individual, corporate	N/A	Chargify/Maxio, Stripe
Products	One-off and recurring	Mainly corporate	For members	Currently not available
Services	One-off and recurring	Mainly corporate	For members	Currently not available
Courses and training	One-off and recurring	Individual, corporate	For members	Hubspot, Eventbrite, Moodle
Events	One-off	Individual	For members	Hubspot, Eventbrite, Hopin, Stripe

4. Requirements

4.1 Design requirements

Discovery
- We expect the contractor to perform a deep dive discovery phase
- The contractor will have access to audience research and persona work that has already been developed.
- The contractor will also have access to key internal and external stakeholders, which the ODI will facilitate.

Website
- The contractor will work in iterations and regular dialogue with the ODI technical and content staff.
- The contractor will adhere to the ODI identity guidelines and brand principles. We will supply our brand book and the contractor will be able to speak to our brand specialist.
- The solution needs to be flexible and ensure scalability for future development
- The website design and development will also deliver a thorough design system and related building blocks, to help facilitate the consistency of future design updates
- Accessibility will be at the heart of the website. It will meet WCAG AA and UX standards, and also be informed by previous advice given by an accessibility consultant on the ODI Summit (ODI to supply)
- The website is fully responsive on mobile devices (56% of sessions are currently on mobile).

Administrator
- The contractor will provide ODI staff with training and access to a guide on how to administer the site
- ODI staff will need to be able to:
    - Share previews of webpages (or private webpages)
    - Clone current pages, create a range of designed templates and use widgets (e.g. accordions, promo cards, CTA boxes)to expose content.
    - Create new pages based on a set of components (e.g. columns/grids/blocks) placed on a modular layout.
    - Embed rich elements like video, images or GIFs or other content from our systems.
    - Configure different levels of user access for a range of user types (eg. admin, editor, guest, track content engagement, views, downloads etc.)

4.2 Technical requirements

We want to ensure we're future-proofing any future website design that integrates into our current tech stack, allowing us to manage our members' and clients' requirements, integrate the revenue into our project and delivery system, accounting system and CRM platform to gain better insight. The ODI is seeking to minimise any in-house development and choices on technical stack will be based upon a number of criteria:

4.2.1 Security

As the website will be processing customer details, security is the highest priority and we will be assessing suitability against UK Data Protection regulations, insurance requirements, cyber essentials and ISO27001. Data should be held and processed in the UK (or EU pending evaluation). Providers should also outline their commitments to security and how they will be supporting us as a client on an ongoing basis and any costs involved.

4.2.2 Privacy

We regard the right to privacy as fundamental. Any solutions should minimise the use of technologies that seek to invade or otherwise track behaviour of individuals in a disproportionate way. For example, embedding of facebook or other pixels should be avoided wherever possible.

4.2.3 Continuity

Although we are looking to change the website in order to serve our stakeholders better, this must be done in a way that provides continuity of content as well as the relationships between different types of content as specified by the current data model. We will evaluate this in a number of ways:
  A) No 404s are acceptable for currently in use URLs. Any redirects must be to the same content in its new location (in the case of content) or equivalent locations, in the case of navigational pages.
  B) Utilisation of the deep linkages in the data model which connect content together. These allow the filtering and user based navigation by topic, tag, or even person.

4.2.4 Scalability/flexibility of the data model

We believe that WordPress, in using SQL, is no longer appropriate to serve the data to any presentation layer such as the website. We feel SQL is not appropriate for a deeply connected network data model. As part of the project we envisage the separation of the

content management, data management and content discovery layers and use of APIs to connect them.
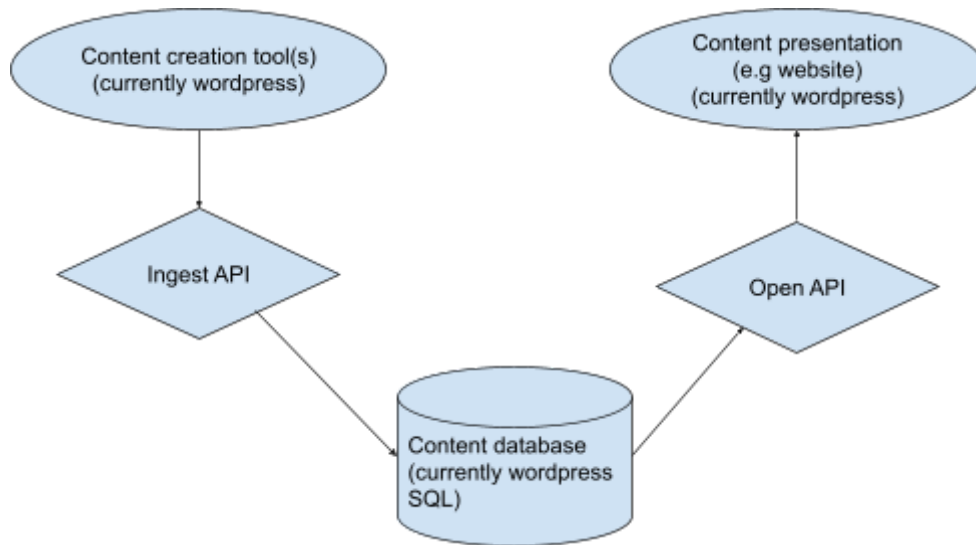
We see potential for this to work in a number of ways and welcome proposals that discuss the following:

Potential option	Advantages	Disadvantages
A: Maintaining WordPress and the WordPress database for content creation, adding an open API and new data layer that extracts data from WordPress and prepares it for discovery.	No need to procure and set up a whole new CMS (something that could be done later). Allows us to secure the WordPress instance and not have to rely on its front end any more. Cheaper? Maintains the data model.	A shim is needed between the WordPress database and the open API to ensure performance of the external services is not held back by the SQL database as currently. Advantages of more modern CMSs are not available at this stage
B: Replacing the WordPress CMS with a new CMS and presentation layer (website)	No need for a shim or layer around WordPress. More optimal and easier to manage.	New CMS would need to be configured with data models and interfaces for content creation. Longer in time to implement and more costly? Maintaining the data model and provenance of relationships and URLs would be challenging? A lot of moving parts to set up many new services at the same time?

C: Replacing the whole WordPress stack with one new "does everything product"	No need for a shim or layer around WordPress. More optimal and easier to manage.	In a way similar to WordPress, everything is then in one system and it is difficult to update/change individual parts and use them more flexibly. New CMS would need to be configured with data models and interfaces for content creation. Maintaining the data model and provenance of relationships and URLs would be challenging?

4.2.5 Speed and performance

We expect all pages to load in less than 300ms for the main content. We make use of Cloudflare for caching, but are open to approaches that provide speed and performance while balancing this with the ability to update content at short notice.

4.2.6 Accessibility

We regard accessibility and compliance with standards such as WCAG as critical. We will also evaluate the performance of the site on mobile devices and in areas of low bandwidth.

5. Timeline, budget and deliverables

5.1 Timeline

The project is scheduled to start in April 2023 with the first release of the website expected in July 2023. We are open to flexibility on timelines depending on prioritisation and sequencing and expect this to be a part of the outputs of the discovery phase and project plan presented to the ODI.

5.2 Budget

We encourage bidding agencies to consider what the right budget should be, that takes into account our requirements and organisation size. We are open to proposals that advise on how to achieve the best results for a first release, and looking beyond this, how we should go about making ongoing improvements (to include standard maintenance agreements).

5.3 Deliverables

- We expect to have a single point of contact with the vendor
- We expect to have weekly check-ins for the project
- We expect to have a comprehensive project plan detailing workstream, benchmarks, areas of responsibility, timelines etc.

As mentioned in 5.1, we're open to several releases following the first deadline of July 2023 and working together with the supplier to determine what each release should include, depending also on the progress we make internally.

As for the 1st release in July, we're expecting the website to include the following:

Core site areas [the naming convention will depend in part of user testing, and understanding what categories make most sense to our customers]:
- Homepage, About and Contact
- Products and services - products, consultancy services, research services, public policy services
- Membership (membership types and process to join)
- Content: Reports, Blogs, Project pages for specific pieces of work, Courses and Case studies
- Events
- Training and learning

NB: We can share more of our thinking around the taxonomy of the site (and how it links with our separate go-to-market strategy with the winning agency. But please note that new products and services are in development and we expect to launch them with the launch of the new website.

Core functionality:
- Robust safety solution against hacking and safeguarding personal data
- Ability to search content
- Ability to filter content (i.e. type, topic, date)
- A administration system that covers the requirements stated in the related section(4.1)
- Ability to purchase membership subscriptions
- Ability to subscribe to and purchase courses
- Ability to subscribe to and purchase events

Note: these are the focus areas for the new website, and the ODI will audit and provide a comprehensive list of existing content areas to be included and migrated (for a guide please see 2.3).

6. How to participate

6.1 Timeline and deadlines

Date	Activity
Feb 28th 2023	Tender published
March 8th 2023	Deadline for clarification questions
March 13th 2023	Responses to clarification questions
March 16th 2023	**Tender submission deadline**
March 22rd 2023	Shortlist interviews
March 24th 2023	Successful bidder announcement
w/c March 27th 2023	Finalise contract and award

6.2 Submission procedures

- Questions and clarifications need to be sent over via procurement@theodi.org. Questions and clarifications will be made available to all applicants.
- All responses must be in English
- The final proposal needs to be submitted via procurement@theodi.org
- Participants are free to choose the best format to present their response (i.e. PDF, PPT, GDoc, etc)
- The proposal should be structured under the following headings:

Heading	Including
1) Agency experience	- Company profile - Portfolio of selected works - Past clients - Client references from past 12 months
2) Approach and strategy	- Vision to address the main challenges (see 3) - Design and technical process to satisfy the requirements (see 4)

3) Technical solution	**-** A description of the system you're planning to use and how it integrates with our existing systems - How you plan to meet all our technical requirements, including the scope of your solution and requirements for integration with other systems (see 4.2.4) - Other information about the tech stack to include eCommerce for membership subscriptions and product purchasing
4) Work plan, governance and costs	- Roadmap (activities planning with milestones) - Team description (roles, etc) - A cost breakdown with proposed fees for key activities in the work plan - Costs for hosting and other services, e.g. maintenance

6.3 Evaluation criteria

Each tender will be reviewed and evaluated impartially by the ODI to identify the most cost-effective offer in terms of value for money, quality, and technical merit.

The evaluation criteria are set out in Table A below.
The evaluators will award scores 0 to 5 for each of the criteria displayed in Table B.
These individual scores will then be weighted using the weightings, and combined to arrive at a final score for each tender.

Table A	
Award Criteria	Weight
1) Agency experience	15%
2) Approach and strategy	30%
3) Technical solution	35%
4) Work plan, governance and costs	20%

Table B	
Score	**Description**
0	Unacceptable: The information is either completely omitted or completely fails to meet the standard/requirements.
1	Poor: The information submitted has major omissions or fails to meet the standard/ requirements in more than one area.
2	Inadequate: The information submitted has some minor omissions or demonstrates only limited compliance with requirements or fails to meet the standard in one area.
3	Satisfactory: The information submitted meets ODI's requirements in demonstrating compliance with requirements.
4	Good: The information submitted provides strong evidence of compliance with requirements and exceeds the standard in one area.
5	Excellent: The information submitted meets all aspects and exceeds the standard in more than one or all of those aspects.