



the Jane Goodall Institute

Request for Proposals

Jane Goodall's Roots & Shoots Youth Program
Content Management System Implementation,
Website Design and Online Community Development

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Jane Goodall's Roots & Shoots Youth Program Content Management System Implementation, Website Design and Online Community Development Request for Proposals (RFP)

Project Overview

The Jane Goodall Institute (JGI) requests proposals from a single vendor or a consortium of vendors for the following services: implementation of a web-based communications platform for Jane Goodall's Roots & Shoots our flagship youth program that brings young people together to take action in their own communities to benefit people, animals and the environment and then networks the young people and their projects with others young people around the world participating in the program.

Our ideal Web presence will facilitate three main functions: marketing the program (globally, nationally), connecting members with each other, JGI, and the tools they need to take individual action in their daily lives, or with a group of friends, succeed, and hosting training resources for educators/brand ambassadors. The website should prioritize young people as its target audience while providing easy to find content and supportive tools for educators and program leaders. When educators or young people visit our site, they should quickly understand how they can take action within the Roots & Shoots network and connect with other members around the globe. The platform should also demonstrate how our the Roots & Shoots program relates to Dr. Jane Goodall and the Jane Goodall Institute, and what our mission/purpose is, and how they can get involved. As a visitor digs deeper, to fully experience the platform, they'll find their way to content specific to their needs and interests as an educator, parent, student, collaborator, or donor.

All of our members desire to connect with one another, whether to plan an event with a nearby group or ask a group leader across the country how they completed their project. Members should be able to do this securely and efficiently. They should also be able to share inspiring stories about the actions they are taking in their communities. Their group and project "profiles" should resemble personalized scrapbooks more than spreadsheets of data. Our Web presence must enable the use of multiple social media platforms to include in and to share out these "scrapbooks." When signing up or sharing project information, members should understand how/where to access materials and support they need to succeed (i.e., curriculum ideas, toolkits, project guides and timelines, mini-grant applications.)

Our current website is problematic in terms of its dated look, its lack of responsive design, and in the way the information is structured. It is also missing key functionality to support immediate understanding of the program and engagement with it under that is important to the global Roots & Shoots community and the success of the program (including a way for members to communicate and collaborate.)

This document outlines the overall vision for the Jane Goodall's Roots & Shoots Web presence and multi-site platform which will need to be completed in several phases.

With a budget of \$40,000 available, JGI hopes to complete the first phase of this new Web platform for Jane Goodall's Roots & Shoots. In Phase I, we expect to convert the existing rootsandshoots.org website to Wordpress, map and migrate content (as appropriate - admin and member user data, copy, images, etc ... and data), and establish new member registration and action reporting (sharing) action workflow including forms. Social media integration, and member/action database.

The website should be built from the same template used on the Jane Goodall Institute master site (Joyn Template). We are mandating use of the template because the priority for investment of time and effort must be on the communications interface rather than on the design. It is our desire that the new rootsandshoots.org Wordpress platform (marketing site) aligns with the janegoodall.org Web presence while meeting the needs of our target audience(s). It should include a simple, mobile-friendly registration system that prioritizes key pieces of data about users and allows for automated follow-up communications that encourage users to update their profiles over time providing more information about themselves, their group, and their actions/projects (a "getting to know you" life cycle.) The initial registration process should allow users to register using social profiles.

Future phases of this project will involve developing and incorporating additional sites within the platform for more robust community connections and training functionality, as such, multi-site capabilities should be considered in completing this initial phase of development.

Please send proposals to Shawn Sweeney at ssweeney@janegoodall.org. Proposal deadline is Monday, June 5, 2017. No phone calls please.

About Jane Goodall's Roots & Shoots

Jane Goodall's Roots & Shoots is the global youth leadership program of the Jane Goodall Institute (JGI). Founded in 1991, it is now active in almost 100 countries with hundreds of thousands of young people who are inspired by Dr. Jane Goodall to make the world a better place.

Dr. Goodall and a group of Tanzanian students founded Roots & Shoots on their shared belief that the world is in peril, and that young people can play a huge role in creating a more hopeful future.

Today, Roots & Shoot is growing the next generation of Dr. Jane Goodalls, mobilizing an entire generation of young citizens with the knowledge and skills to become compassionate leaders to make change happen in their own backyards and collectively around the globe.

A clear path to action and impact

Roots & Shoots builds on the vision of Dr. Goodall to place the power for creating practical solutions to big challenges in the hands of young people. The program gives them a clear process for taking action and getting results as they:

- Identify challenges for people, animals and the environment in their own communities.
- Collaborate with community leaders and experts to develop a plan to address a specific need.

- Take action through youth-led projects and service campaigns to carry out their plan and address the need they identified.
- Take stock of their impact, celebrate what they accomplished, and apply what they learned to the next issue they decide to take on.

Through this process, young people develop the skills to become compassionate leaders, are engaged in the world around them and develop the behaviors and attitudes to be good stewards of the environment.

Sharing science-based conservation techniques

To help assess local needs, Roots & Shoots participants use community mapping, a hands-on tool used by leaders in chimpanzee-range countries for conservation planning in their own communities. Roots & Shoots groups head outside to explore their surroundings—both built and natural—making observations and identifying where they could make improvements. Based on their observations, they create a map of all the ways their community could be improved. Their Roots & Shoots community map serves them as a guide for developing a community-specific service campaign.

Tools and training for educators and mentors

With the guidance of an adult mentor or educator, the Roots & Shoots program model thrives within traditional classrooms, after-school programs, zoos, libraries, faith communities and anywhere else young people have the opportunity to work together.

Roots & Shoots provides support to both young people and their adult facilitators, who are often educators. For young people, we provide the model, tools and network to thrive as leaders in their communities and beyond. For their adult mentors, we offer online training on service learning and community mapping. We can also support educators' service learning campaigns and help them receive mini-grants from JGI.

Promoting youth leadership

Roots & Shoots members are becoming the informed generation of compassionate leaders that the world urgently needs. We help them gain the knowledge and confidence to be innovative stewards of the environment and grow into advocates and activists for a sustainable planet.

Exemplary Roots & Shoots youth who demonstrate strong leadership by making a measurable impact on their communities are invited to join the Roots & Shoots U.S. National Youth Leadership Council (NYLC). Members work as mentors and youth ambassadors to strengthen the Roots & Shoots network and create and lead special projects. NYLC members have been featured in Animal Planet documentaries, developed and implemented global conservation campaigns, participated in international leadership immersion trips to Africa and Central America, and represented Roots & Shoots at the United Nations.

What We Seek from a Vendor

The Jane Goodall Institute is a scrappy organization. We are a committed, hardworking and passionate. We all wear multiple hats. Consequently, we seek a vendor who is forward-thinking protective of our

interests and brand, and proactive in taking us to the level of Web presence that truly reflects the amazing work of Dr. Goodall and our programs.

Since we are planning to work with this vendor to host and service our Web presence, we are looking for a strong values alignment with them. Our values are detailed below:

- We strive to respect, nourish and protect all living things; people, animals and the environment are all interconnected
- We believe that knowledge leads to understanding, and that understanding will encourage us to take action
- We believe that every individual has the ability to make a positive difference
- We believe that flexibility and open-mindedness are essential to enable us to respond to a changing world
- We require integrity and compassion in all that we do and say

Budgeting

Roots & Shoots has budgeted \$40,000 for the first phase of web platform redesign. The funding for the project is in place and Roots & Shoots and JGI are ready to begin the project as described above.

Proposed Timeline

May 22, 2017 – RFP Issued

June 5, 2017 – Bids due, evaluation begins by review panel

June 12, 2017 – Scored rankings by review panel complete & recommendation is prepared

June 12, 2017 – Contract offered to winning proposal, contract finalized over the week

June 19, 2017 – Phase I Project kick off

August 21, 2017 – Phase I Beta Launch

October 1, 2017 – Phase I Full launch

What We Want Out of our Website

JGI sees the Roots & Shoots website as a vital tool to capturing the interest of young people inspired by Dr. Goodall, engaging them in meaningful actions that improve their communities and connect them with each other as well as other partners and collaborators. We are anxious to use this website in the program's revitalization process as an opportunity to help us fully articulate the Roots & Shoots brand through sharing the actions of the young people who are involved and that shows rather than tells our their work. We want a website that serves as a hub for anyone interested in supporting their work.

Our Site Goals, in order of priority, are:

1. To increase the total number of active, registered Roots & Shoots members and the number of actions they take and share
2. To communicate briefly, clearly and plainly how to get involved in the program and to provide an entry point for connecting with other members or groups

3. To create a community where Roots & Shoots members can connect with each other sharing the actions they are taking in their communities and their expertise
4. To fully align Roots & Shoots as a program of the Jane Goodall Institute while balancing program-specific branding and messages within the JGI brand and mission

We want the Roots & Shoots website to be driven by the actions that Roots & Shoots members share through a storytelling-oriented form on the site. Members should be able to share photos, video and maps of their actions and they should be able to search through other actions that other members have taken in their area. They should be able to list their actions as one in which other members can “join.”

Through their actions members should be able to connect with other actions within the network that might be of interest, either based on the issue they are interested in or their geography. They should be able to give each other (moderated) feedback through commenting and ratings, connect locally through moderated digital “bulletin” boards and social media groups.

We also want the site to weave together the story of our members with the results of their actions. We enjoy the enormous benefit of having been founded by an iconic and universally beloved leader. However, we are continually faced with the question of what happens after Jane. While there will never be another Jane Goodall, the actions of the young members of Roots & Shoots are leading their own efforts that are imbued with Jane’s values and mission. We want this iteration of the Roots & Shoots website to help make this connection and demonstrate that these young people are a major part of Dr. Goodall’s legacy.

Finally, we want the Roots & Shoots website to look and feel clean and modern. The Roots & Shoots program is grounded in the grassroots nature of its origin. But our approach, is based in a leadership competency model and best practices in service learning. It has been honed down to focus only on what moves the bar with regard to youth engagement. We want a look and feel that demonstrates the large reach of the Roots & Shoots program and the depth of each individual member’s impact in their community.

Key Audiences

Our key audiences, in order of priority, are:

1. **Youth:** Young people who are motivated to take action on behalf of people, animals, and the environment should find the following on our site: 1) inspirational and encouraging stories about other youth with whom they can identify who are making a difference, 2) instructions for how they can join a group/campaign or start a group/campaign, 3) a network of peers that they feel a desire to join and with whom they can communicate about their work. We are working from the bottom up with broad marketing campaigns to attract the attention of more young people expanding the program’s base of support. This Web platform is imperative for achieving this goal.
2. **National Partners:** The Jane Goodall Institute is currently developing national partnerships with organizations such as Boys and Girls Clubs and Girl Scouts to establish large-scale deployment of

the Roots & Shoots program through the after school programs' of these other organizations. These partnerships will entail JGI staff providing training to adult mentors in these programs with these mentors subsequently implementing the Roots & Shoots program with their established groups of students. While the first phase of development of this new website may not immediately serve the needs of these partnerships, we must not make decisions that would make it cumbersome or challenging to build them into the site in the future.

3. **Educators/adult mentors (brand ambassadors):** Teachers and adult mentors serve as brand ambassadors for Roots & Shoots. Much of the program's resources have been developed to 1) help teachers understand how the program works, 2) how to implement the program in their classrooms or other environment. Once they are trained, they bring the program into their classrooms and train young people. This is the Roots & Shoots model for scaling the program. Addressing the needs of these teachers is our other primary strategy for growing the program from the top down. Like young people, these teachers need to see this Web platform have the kind of clear path to action for young people, and meaningful learning experience to prioritize the time in their learning environment to lead the Roots & Shoots program.
4. **Curious learners/general public:** Often users come to our site to learn about Dr. Goodall's life and history as well as to learn how they can become involved in her mission to create a better and more harmonious world for people, animals, and the environment. This audience should be able to quickly understand our program's purpose and mission, review testimonials from educators and youth about why the program works, and review compelling statistics that illustrate the program's global and long-term impact. They should understand how to start a service project of their own or become involved in other ways (i.e., donate, request to collaborate, etc.)
5. **Community collaborators:** Organizations looking to partner with Roots & Shoots to help both organizations reach their goals should find information on the site about how the program works and how they can collaborate with Roots & Shoots program staff and groups/members.
6. **Donors:** Individuals, decision-makers at foundations and corporate giving programs and others involved in the philanthropic process. This audience, mostly served by janegoodall.org, should be able to understand the strength and credibility of our overall strategy and the logic behind it while providing a sufficient level of specificity about specific projects to inspire them to give. This audience will be greatly served by receiving regular (and automated) updates about the program's activities and impacts.
7. **Administrators:** The Web platform should serve as a reference point for staff and an easy-to-use resource for staff to share when explaining our work. This audience will also be greatly served by receiving regular (and automated) updates about the program's activities and impacts.

Required Functions

Initial Phase

Simple Registration and Member Database - we want a registration process that is clean and simple and works across multiple devices, primarily mobile devices. During registration we want to encourage members to share the bare minimum about themselves or their groups up front and then use automated email to encourage them to complete their profiles - through a welcome series or “getting to know you” email life cycle.

Logic Driven Action Sharing Tool - member’s actions are shared with us via a form with logic that is tailored to the characteristics of the project. Each stage of the sharing form should be tailored to options that users have so we make it as easy as possible for them to complete the form. Users feel that the process of reporting projects is too onerous and should be more about telling a story, rather than submitting some kind of data sheet or accounting records. Make use of conditional logic to let users choose the elements of their project that are most aligned with their work including long term vs. repeated vs. single time projects, ones that are group only, or more community oriented, etc. Like member registration we expect that members will share only the bare minimum when they kick off a project, and then through email be prompted to share more details about their projects as they progress through it.

Campaigns - We also want our campaigns — action opportunities that are predetermined — to automatically feed into action sharing. While members primarily lead their own efforts throughout the year JGI hosts campaigns designed as a simple entry point if a new member isn’t sure where to get started. Everyone who takes an action in one of these campaigns should be added to the action database. We want to increase their engagement after they participate in a campaign though so we’ll want to connect them with other similar projects or encourage them to do their own DIY action.

Building Community and Moderated Groups - we would like for members to be able to connect with other like-minded groups in their own backyards as well as around important global issues that concern them. Members should have the ability to comment on each other’s actions and be presented with other actions that might be of interest (either topically or geographically) when they submit their own. They should also be able to connect with each other easily through a series of moderated groups that may exist on a social media platform like Facebook.. We are also eager to explore ways of creating localized digital “bulletin boards” for groups of members to share important local information about their actions and opportunities that might be of interest locally.

Email automation - the system should allow admins to create email campaigns that are automated based on certain triggers associated with user interaction. Some examples might include registration triggering a series of welcome emails, or starting a project triggers a series of emails that encourage the users to complete the project report until it is complete.

Data exporting - it is incredibly important for the JGI and Roots & Shoots staff to be able to extract and analyze certain types of data. Data export should be flexible to allow for custom reporting, with some standard pre-established reports that are automatically generated. Reports should include:

- Member/group data - location and demographics

- Projects - total number in the database (in a given time range), number within a given geographic area (city, state, zip, country), number of participants, service hours, demographics of projects, etc ...
- Users should be able to comment on their own and others' project pages. Project leaders or administrators should be able to approve these comments before they are public.

Content search-ability and localization - users want to be able to see Roots & Shoots efforts happening in their own backyards, as well as around the globe. They want to feel that they are contributing to and part of something bigger — a global effort/mission. The platform should highlight this.

- When users come to the site, they should be prompted to ask for their location whether its automatic geolocation based on IP address (will work better for global) or their city, state/province, country.
- Users should be able to browse a dynamic map and search interface with all of the groups, projects and community collaborators from around the world. A project/action map should illustrate if a project is open to others to join. That way when people are searching in their community they can connect with other action leaders around a project rather than any kind of group that they have formed.

Social Media Integration - at a minimum the site must offer opportunities for young people to register and login via social media credentialing, however in addition we desire further social media integration whereby young people, using their existing social networks and apps, can connect with one another, share the actions they are taking and interact with site elements that cross over seamlessly between the site and the social networks.

Future Development

Multi-site platform - the platform should support multiple sites which each support a different purpose or functionality. Primarily the sites should facilitate three main user interactions:

1. **Marketing:** Marketing the program (globally, nationally)
2. **Community:** Connecting members (youth and educators) with each other and with JGI
3. **Training:** Educator/brand ambassador training

Build functionality to streamline work processes - we should be able to facilitate the completion of mini-grants, certificates of recognition, and other opportunities for members through the Web platform including the ability to search projects and assign them to a mini-grant/certificate submissions, thereby reducing redundancy in data entry and ensuring that all of our project data is in one place. For example, during the user's reporting process, they can check a box to indicate that they'd like to have their project considered for a mini-grant or other opportunity. Checking this box would open another page or area for them to include additional data required to apply for a mini-grant or other opportunity.

Single sign-on - recognizing that the platform will involve the use of multiple stand-alone sites that interact with each other we must ensure that users have a seamless experience with a single set of credentials.

Global registration - the site should create the opportunity to capture the registration information for any user and redirect them to the appropriate JGI/Roots & Shoots global site. It is not enough to simply present them with a map that sends them to a country site, it should actually encourage them to register and then redirect them. JGI country representatives should have access to the data of the users who have registered in each market.

Need to streamline workflows for training educators - make use of software that will permit JGI to have greater control of online course content, creating advanced opportunities for educators who continue on in the program. NB: JGI currently uses Google's Coursebuilder for our summer online course, and are looking at other platforms in the future with Coursera as well as other open online course platforms to train teachers. This new platform should consider integrated training options, and options for monetizing advanced training opportunities.

Access to materials/resources - while users will access resources through the online courses/training that Roots & Shoots offers, these resources and materials should be searchable somewhere so that following a training, educators can easily search for something they are looking for.

Brand Positioning and Design Specifications

- The design should be built off of the Joyn Template
- Site should highlight how Roots & Shoots is integral to JGI brand and messaging platform.
- Visual design should meet the needs of the target audiences, but also align with the janegoodall.org Web presence.
- Need to consider the multi-generationality of the market these days:
 - **Millennials vs. up-and-coming post-millennials** - each has their own personas and needs
 - **Master teachers vs. new teachers vs. pre-service teachers** - messaging and resources should cater to educators who have been teaching for decades as well as those who are just beginning or exploring project and service-based lessons
 - **Multi-cultural audiences** - ensure that the platform has multilingual capabilities
- Design/layout should reflect current trends and new technologies without getting in the way of clear communications
- Emphasis should be placed on imagery and video content
- Final design should be clean and simple with easy navigation, lots of visuals and efficient use of text
- Maps: leverage available data and maps and <https://storymaps.arcgis.com/en/> for map use on the site
- Young & “hip” audience: use colors, fonts, imagery that attract young people, give the platform a “cool” factor
- Member/group/project profiles should be organized so that pictures, geographic location, and impact data tell a clear and powerful story about the individual, group, or project.

Technical Considerations

Mobile-first design - we must ensure that all functionality in the Web platform is mobile accessible and that we're using responsive design.

Geo-first design - since mapping is such an integral part of the fabric of JGI, as well as Roots & Shoots we must ensure that all of our data architecture is well positioned to be represented on maps as we are able to complete them.

Low bandwidth environments - we want to recognize the fact that a segment of the Roots & Shoots audience are in places where they may not always have a strong Wi-Fi connection, nor a data connection. We should ensure that the system will have functionality, such as project reporting that can be completed while in such an environment/offline and then uploaded later when a better connection is established.

Proposal Format

Executive Summary: Please describe your approach and why you feel it best meets our specific needs

Technical Approach:

- Web development process: explain the process you will follow to build the website, including major milestones and evaluation.
- Address any important technology information and specifications used in your solution.

Management Structure:

- Describe the how your organization will manage the project
- How do you communicate with clients
- Describe your processes; including lines of reporting and your project management approach
- Schedule of deliverables: include major milestones and testing proposal.

Budget Detail:

- Break down cost by production hours, tools and functionalities.
- Maintenance and support: identify any costs that should be assumed as part of the site and ongoing costs for maintenance and support we need in the future.
- License fees: identify the costs we will need to pay to develop or host the site.
- Training and Style Guide: identify costs to train our staff to use site tools and provide a style guide.
- Other charge areas: Please identify whether there will be other expenses, consulting fees, future work, etc. to complete this project.

Attachments:

- Qualifications and Experience: relevant case histories
- Brief biographies and hourly fees of all who will work on account
- The team structure you will employ for client service delivery
- Four professional references and contact information

Contact and Staffing

Shawn Sweeney, Director of Community Engagement, will serve as the chief point of contact for the vendor. Adrienne Bermingham, Roots & Shoots Program Coordinator, will also be a day-to-day point of contact for the vendor. Additional staff support for the project will include:

- Erin Viera-Orr, Associate Vice President of Jane Goodall's Roots & Shoots will provide general oversight and final decision-making.
- Kamilah Martin, Associate Director of Jane Goodall's Roots & Shoots will provide general oversight.
- Stephanie Keller, Education Projects Manager, will contribute content.
- Emily Rhodes, National Education Manager, will contribute content.

All questions about this RFP should be directed to Shawn Sweeney at 703-389-7575 or ssweeney@janegoodall.org.