



PolicyWise Request for Proposal – Brand and Website Redesign Frequently Asked Questions

1. What is the established budget for this project?

PolicyWise has allocated a budget range of \$125,000–\$150,000 CAD for the brand and website redesign. We encourage proponents to tailor their proposals to fit within this range while addressing the full scope outlined in the RFP.

2. Will the complete new Strategic Direction document be made available to proponents during the proposal period or only to the successful proponent?

The new Strategic Direction document will be shared with the successful proponent at project kick-off during the Discovery & Research phase. It is not available during the proposal submission period. Proponents are encouraged to reference the organizational background and project objectives outlined in the RFP when developing their understanding of PolicyWise's needs.

3. Will proposals from organizations based outside of Canada be accepted?

Yes, proposals from organizations outside Canada are welcome. PolicyWise is open to working with qualified consultants or agencies regardless of location, provided they can meet the project requirements outlined in the RFP, including all applicable Canadian regulatory and privacy requirements. International organizations must be available to conduct work during standard business hours in Alberta. Any proponent based outside of Canada is responsible for managing their own compliance obligations for working in Canada, including any required registrations, permits, tax filings, or other administrative requirements. PolicyWise will not manage or facilitate these processes on behalf of the proponent.

4. Will PolicyWise accept proposals where the interest holder engagement, training activities will take place remotely?

Yes, remote engagement activities are acceptable, so proponents are welcome to propose virtual formats as part of their engagement methodology.



5. Does PolicyWise have a launch date in mind?

Yes. PolicyWise would like to launch the redesigned website and brand identity prior to the end of our fiscal year on March 31, 2027, as project funding is allocated to this fiscal period. We are looking for a timeline that moves efficiently toward launch while allowing adequate time for interest holder review, content development, testing, and quality assurance. Proponents should include a detailed proposed timeline in their submission that accounts for these milestones.

6. Is there recent research we should build on rather than repeat?

PolicyWise has completed two pieces of foundational work that successful proponents can build upon:

- Strategic Direction: Relevant research conducted as part of our strategic direction work
- Interest Holder Engagement Interviews: A series of interviews conducted as part of an internal project.

Both sets of findings will be shared with the successful proponent at kick-off. While these materials provide a foundation for brand positioning and audience understanding, we anticipate that additional, targeted research will be required to fully address the specific needs of the brand and website redesign. Proponents are encouraged to factor in their own discovery and user-centred design research activities within their proposed approach and budget.

Website Content

7. Approximately how many pages or unique content sections are currently on the PolicyWise website, and how many core pages are anticipated to require audit, copy development, editing, and migration?

Excluding Resources for Practice (out of scope) and the archived resources library (which is part of that platform), the core PolicyWise website contains approximately 25 – 30 unique pages and content sections. This includes the main site pages (Home, About Us, Services, Initiatives with their sub pages, Projects, Our Team/Staff, Board of Directors, Careers, Annual Reports, Contacts) plus a paginated news section and



newsletters. The current site hosts about 70 news stories and announcements with content dating back to 2021.

8. Should we plan for content migration from the existing website, and is the plan to keep or re-write the current site content?

We anticipate a hybrid approach. The new website will have a new design and structure aligned with PolicyWise's updated brand and strategic direction. Some existing content may be migrated directly, while other sections may require rewriting to better reflect our current priorities and messaging. Proponents should account for both the design/build work and the content assessment, migration, and editing involved in this transition.

9. Does the website redesign include Resources for Practice, the Spark Guide, or the Board Portal?

The website redesign does not include Resources for Practice, Spark, or the Board Portal. These platforms fall outside the scope of the core PolicyWise website project. However, the redesigned website will need to connect to these resources in a way that is seamless, accessible, and visually appealing, consistent with the RFP's emphasis on user-centred design, WCAG 2.1 AA accessibility standards, and an optimized digital presence.

10. Is there a target page count for the redesigned site or would you like proponents to propose one as part of the information architecture work?

No, there is not a target page count for the redesigned site. We would like proponents to propose one as part of the project.

11. What does publication ready mean? Straight lift, or reviewed and re-tagged against the new information architecture and taxonomy?

For this RFP, 'publication-ready' means content that has been reviewed and adjusted to align with our new strategic direction and the new site's structure. We are not asking for a straight copy-paste of the old site, nor a full rewrite from scratch. Discovery and research work will help identify what existing content migrates, what needs to be created as new, and what we no longer need. The successful proponent should then prepare all final content so it is clean and ready to publish. Proponents should account for the variable nature of this content development in their proposal, recognizing that



the final mix of migration versus new creation will be determined by the findings of the discovery and research phase.

12. Does WCAG 2.1 AA apply to your PDF library?

Retrofitting existing PDFs to meet WCAG 2.1 AA standards is not within the scope of this project. However, we do require that any PDFs migrating to the new website retain their current URLs so that existing links - from social media channels, partner sites, and other external sources - continue to function without disruption. Proponents should ensure their content migration strategy accounts for maintaining these permanent links or implementing appropriate redirects.

Interest Holder Engagement

13. For the interest holder engagement activity, roughly how many interest holders (staff, board, external partners) do you anticipate involving and is there a preferred format (interview, survey, focus group, as examples)?

PolicyWise has not predetermined the number of participants or the specific format for interest holder engagement. The RFP asks proponents to outline their own approach. This includes the number and format of sessions (e.g., interviews, surveys, focus groups) and how insights will be synthesized. We are most interested in seeing each proponent's proposed methodology and how it would achieve the desired outcome of strengthening brand positioning, voice, and audience engagement, as outlined in the project's objectives. Regarding access to external interest holders, PolicyWise will facilitate introductions to key partners and board members as needed.

Proposal & Evaluation

14. What are the specific requirements for proposal submission, including formatting and references?

Proposals must be submitted as a single PDF file to communications@policywise.com by September 28, 2026. Proposals should include an overview of the organization, highlighting relevant non-profit experience (or demonstration of transferrable skills), examples of past work comparable in scope and complexity (with URLs, images, and



short descriptions), a detailed proposed approach and methodology covering brand development, web design, interest holder engagement, and content development, a project plan with itemized budget and timeline, identification of project team including any subcontractors with their roles and experience, and **three client references** for whom you've completed similar work along with contact information. Complete RFP requirements can be found here: <https://policywise.com/news/rfp-for-brand-website-redesign/>

15. Would you consider an agency whose strongest work is B2B or industrial?

Yes, PolicyWise would consider agencies with strong B2B or industrial experience. The RFP specifically asks for relevant experience with non-profits or mission driven organizations and examples of work comparable in scope and complexity, but it doesn't restrict consideration to those sectors exclusively. If an organization can demonstrate transferable skills in brand strategy, interest holder engagement, and website design that meet the project's objectives, their proposal will be evaluated on its merits against the stated criteria.

16. What type of firm (independent or larger) is PolicyWise looking to see submit for this RFP?

PolicyWise is not concerned about the size or structure of the firm submitting a proposal. Whether you are an independent consultant, a boutique studio, or a larger agency, we are primarily interested in your proposed approach and demonstrated ability to deliver on the project's scope, timeline, and quality expectations.

17. Are evaluation criteria weighting or a scoring matrix available to proponents?

Criterion	Weight	What we're looking for
Understanding of the Project	15%	How well the proposal demonstrates familiarity with PolicyWise as described in the RFP (mission, organizational background, project objectives), and shows a tailored understanding of our needs, rather than a generic response, and outlines a clear, logical approach to phasing the work across discovery, brand development,

		website design, content development, and launch
Brand Strategy & Identity Approach	20%	Clarity and depth of proposed approach to brand positioning, value proposition, visual identity refresh, voice and tone definition, and brand governance structure, including how these elements will be developed, tested, and rolled out for internal adoption
Interest Holder Engagement	15%	The proposed engagement methodology including number and format of sessions, participant mix, how insights will be synthesized, and ability to facilitate inclusive and effective consultations
Relevant Experience & Portfolio	15%	Examples of comparable work with non-profits or mission driven organizations, demonstrating scope, complexity, outcomes, and the team's specific contributions. Quality of the provided reference checks
Website Design, UX, & Accessibility Expertise	10%	Evidence of user-centred design capacity, WCAG 2.1 AA compliance evidence, mobile responsive development, SEO and AI discoverability strategy, and CMS and hosting selection rationale
Content Development Capacity	10%	Approach to content audit, copywriting, editing, interest holder collaboration, and producing publication-ready website content
Project Team Qualifications	5%	Relevance of team members' experience to this project, clarity of roles, and transparency around any subcontractors

Value for Cost	10%	Transparency and realism of itemized budget relative to the scope described; we are looking for good value not simply the lowest price
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Contracting & Scope

18. Does PolicyWise require a single prime agency to deliver all work directly, or will you consider teams with disclosed subcontractors?

PolicyWise's preference is to engage one primary partner who is accountable for the entirety of this work. We are open to proposals from independent consultants, boutique studios, or larger agencies, and we would consider a technical studio acting as the prime contractor with a disclosed specialized contractor leading specific streams (such as brand work). In these cases, the prime contractor must manage the subcontractor relationship and remain fully accountable for all deliverables against our agreed timelines. Proponents are required to identify the full project team - including any subcontractors - and provide a brief description of each member's relevant experience and expected role, as outlined in the RFP requirements.

19. Is PolicyWise committed to keeping its current CMS, or is this an open selection? Additionally, what existing tools or platforms must the new website integrate with?

PolicyWise currently uses WordPress as its website CMS. This is an open selection. Proponents are welcome to recommend and implement a different solution, provided it meets the RFP requirements for a user-friendly CMS for non-technical staff. Any recommended platform must be easy to maintain and use by our team, and onboarding PolicyWise staff through training sessions (preferably live) and supporting documentation must be part of the proposed support plan.

Regardless of the CMS chosen, the redesigned website must connect seamlessly to several existing platforms and tools, including:

- Resources for Practice
- Spark Guide
- Board Portal
- Softr



We also manage newsletter sending and list management through WordPress but would like to explore new solutions in this area. The successful proponent should audit these existing tools during the Discovery phase and account for their integration in the proposed information architecture and site design, ensuring connections remain accessible, user-friendly, and aligned with WCAG 2.1 AA standards.

Brand

20. Is PolicyWise open to significant evolution of its existing logo and identity if supported by the discovery process?

Yes, PolicyWise is open to significant evolution of its existing logo and identity where the discovery process and brand strategy support it, with the goal of ensuring the visual identity reflects the new strategic direction and resonates with our audience.

21. Is the PolicyWise name settled or is any part of naming in play?

The PolicyWise name is settled, and renaming is not part of this project.

22. Will the three strands become the public structure of the brand or are they the internal operating model that the brand should sit above?

The three strands – Action-Ready Research, Strategic Initiatives, and Accelerated Advocacy – reflect our internal operating model. We are not prescribing how these should translate into the public brand or website architecture. Instead, we see this as a key question for the discovery phase: the successful proponent should work with our team to determine how best to represent these strands publicly, whether that means they form part of our brand structure, inform the site's information architecture, or sit behind a more unified public-facing identity.

23. Do you see the brand strategy, visual identity, and website work as one integrated stream from the outset, or would you be open to a phased approach where positioning and messaging are clarified first, then translated into the site?

We see this as one integrated project with a logical flow rather than strictly sequential phases. The RFP describes the scope as a cohesive initiative where discovery and research inform brand strategy which in turn shapes the messaging, visual identity, and website design. That said, we recognize that some elements naturally build on



each other. We're open to proponents proposing their own phasing approach as long as it demonstrates how the work streams connect and feed into each other and that the overall timeline still supports a launch prior to March 31, 2027.

24. With respect to brand governance, approval workflows, and asset management, are there particular internal challenges you're hoping this project will solve, such as inconsistent messaging, slow approvals, or uneven staff confidence in applying the brand?

The RFP calls for a comprehensive brand governance structure including brand standards, approval workflows, and asset management, along with templates for consistent application. This work is intended to address the challenges that may typically come up when an organization brand is updated to reflect a new strategic direction. We're not prescribing specific pain points to solve but rather looking for proponents to propose a governance structure that makes it easy for team members to apply the refreshed brand consistently without needing to escalate every decision. The goal is internal understanding and adoption of the brand as outlined in our project objectives supported by documentation.

Technical & Compliance

25. Is there an analytics property, like Google Analytics, we can plan around?

Yes, PolicyWise currently has a Google Analytics property in place. The RFP asks the successful proponent to review current website performance and analytics as part of the Discovery & Research phase, and to configure analytics, reporting, and performance tracking for the redesigned site. Proponents can plan around this existing setup while recommending any additional tools or configurations that would support the project's objectives.

26. Does the redesigned site need to be multilingual?

The redesigned site will be in English. The RFP emphasizes accessibility and inclusivity through WCAG 2.1 AA standards and user-centred design but does not include multilingual content as part of the scope.

27. Is there a requirement for Canadian data residency?

Yes, PolicyWise requires Canadian data residency for the redesigned website, and any other tools recommended through the project (e.g., email platform for newsletter). Our privacy statement at www.policywise.com/privacy-policy outlines our commitment to protecting personal information and managing data in accordance with recognized privacy and governance best practices. Consistent with the RFP's requirement that the redesigned website complies with applicable privacy legislation and industry best practices for user privacy, proponents should ensure their proposed hosting and CMS and any integrated tools support Canadian data residency.

28. With respect to accessibility, privacy, and AI search priorities, are there any specific accessibility, privacy, or content-structure requirements already defined internally that you'd want a successful partner to design around from day one?

Yes, the redesigned website must be designed with the following in mind:

- Accessibility: WCAG 2.1 AA as specified in the RFP
- Privacy: adherence to PolicyWise's privacy statement, available on our website, and compliance with all applicable Federal and Provincial legislation. During the discovery phase this can be explored further
- AI search content and structure: as stated in the RFP the website must support discoverability and accurate representation in AI-powered search engines, generative search experiences, and LLM-based assistants.

Additional Information

29. Will PolicyWise meet with any proponents to answer questions about the RFP?

At this time, PolicyWise will not be scheduling meetings with individual proponents until after the RFP closes and all proposals have been reviewed. If you have questions regarding the RFP, please forward them via email to LBergin@policywise.com. Questions received will be answered and added to this FAQ document where appropriate.