

## Request for Proposals: SaaS UX Design and / or Development

### Table of contents

<b>Background</b>	<b>1</b>
<b>About EdFuel</b>	<b>2</b>
<b>Project Scope</b>	<b>3</b>
Product design scope	4
Product development scope	5
High-level timeline	6
Project management & team collaboration considerations	6
<b>Evaluation &amp; selection criteria</b>	<b>6</b>
<b>Intellectual Property &amp; ownership</b>	<b>7</b>
<b>Proposal requirements</b>	<b>7</b>
Contractor profile	7
Client & reference information	8
Process & philosophy	8
Portfolio & case study	8
Scope of work	8
Fees	9
(Optional) Other information	9
<b>Timeline</b>	<b>10</b>

### Background

[EdFuel](#) is a national talent management nonprofit that empowers education organizations to effectively recruit and retain diverse, high-quality staff through comprehensive and equitable talent management systems.

EdFuel historically works through direct client engagements, providing coaching and consulting services to design custom talent solutions. In addition, EdFuel facilitates workshops and publishes open-source research and toolkits.

Over the next 1.5 years, EdFuel is developing a SaaS solution that productizes aspects of their current offerings to support more education organizations and enable them to self-serve.

EdFuel has engaged a product lead and is seeking UX design & software development partners (individuals or agencies) to engage in the design, development, and delivery of a minimum viable product (MVP) and beyond.

**This project may be bid for ONLY design, ONLY development, or BOTH. EdFuel is contracting for both but is open to separate agencies providing design & development. Please see the scope and budget to respond appropriately.**

## About EdFuel

**Our Mission:** We empower education organizations to effectively recruit and retain diverse and high-quality staff through comprehensive and equitable talent management systems. We work with organizations to facilitate capacity building at all points along the talent management lifecycle.

**Our Vision:** Our partner schools will be healthy, stable, safe environments for all students, allowing them to achieve at the highest levels. We believe this ultimately depends on creating an equitable and inclusive environment for staff. Creating this environment requires the recruitment and retention of high quality, diverse people who experience consistent talent processes and systems of accountability and support.

**We believe an equitable and inclusive environment, with consistent talent processes, systems of accountability and support, fosters high levels of satisfaction and retention.**



**Our Commitment to Anti-Racism:** As an organization, we stand strongly against bigotry, racism, and discrimination in any form by our staff or partner organizations. We are committed to advancing as an explicitly anti-racist organization through both our internal values and our external work and interactions with partners.

We believe that talent work is equity work. Organizations must be diverse, equitable, and inclusive to be able to recruit and retain high-quality teachers and leaders. In order to achieve this goal, organizations must first develop policies, practices, and behaviors to dismantle racism. Accordingly, diversity, equity, inclusion, and anti-racism are the core lenses through which we view all of our work. For details on our commitments and beliefs, see our anti-racism pledge [here](#).

## Project Scope

EdFuel is creating a cloud-hosted web product that productizes aspects of their consulting service. The new offering will provide a dashboard and customizable tools to allow talent leads in educational settings to confidently and competently design systems to recruit, hire, and retain strong, diverse talent pools on their own.

Initial discovery is complete, and product strategy and high-level scope defined. The MVP prototype has gone through initial user testing and validation but needs additional definition & validation. In terms of [Garrett's 5 planes](#), we will engage with

- strategy & scope: defined
- structure & skeleton: partly defined
- surface: undefined.

Notable functionality includes:

At MVP

- A UI to navigate to resources
- Ability to download EdFuel resources (documents & videos)
- An onboarding diagnostic resulting in personalized recommendations
- Creation of a user account & profile to allow users to bookmark resources, save diagnostic results, and capture their talent system plan.
  - This may include 3rd party logins, e.g. through a Google account
- A small number of customizable plans and templates

Future state

- Incremental buildout of customizable plans & templates
- Incorporation of an existing compensation benchmark study, including the ability to search for benchmark data and filter on cohort characteristics like school size, geography, etc.
- Other features to be identified through the build-measure-learn cycle

To facilitate your proposal, a walkthrough of the initial prototype will be provided upon request. An NDA signature will be required. Please reach out to Kristina Campa-Gruca ([kcgruca@edfuel.org](mailto:kcgruca@edfuel.org)) to schedule time.

**We are looking for vendors who can serve as collaborators and thought partners and are familiar with iterative, agile, human-centered design & development practices - this is more than execution on a strictly designed spec.**

This means you will be involved in research, ideation, and prioritization activities. Successful bidders have a history of rapid prototyping & experimentation to develop entirely new products, criteria-based decision making per user needs & research, collaborative problem solving in a product “triad”, and stakeholder management. Experience in the design / dev lead roles in a SaaS organization is a plus.

EdFuel is seeking a vendor to design and build this new product.

**Respondents may propose for design alone, dev alone, or both.**

### **Product design scope**

EdFuel is seeking a designer (individual or agency) familiar with human-centered design who can be a thought partner during the definition process, work together to define/validate MVP & the roadmap beyond, bring the product to launch, and iterate.

Responsibilities:

- Design a modern, user-friendly, validated design that delivers on the product objectives, including but not limited to:
  - New functionality that meets user needs as defined by product strategy
  - Accessible (at least Section 508 compliant; WCAG 2.1 or latest standard at the time of launch)
  - Mobile-first design
- Conduct necessary discovery, research and testing to inform design, test prototypes, and test product builds, including rapid prototyping, hypothesis & A/B testing.
- Collaborate closely with the EdFuel product lead, other EdFuel stakeholders, and developer(s) to define new features and functionality
- Incorporate EdFuel’s brand language
- Create documentation & specs:
  - to enable development (pixel perfect, mobile-first, accessibility compliant). Because we are taking a dual-track approach, this will not be “one final spec” but ongoing specs as the product evolves
  - to communicate with project stakeholders (storytelling & persuasion)

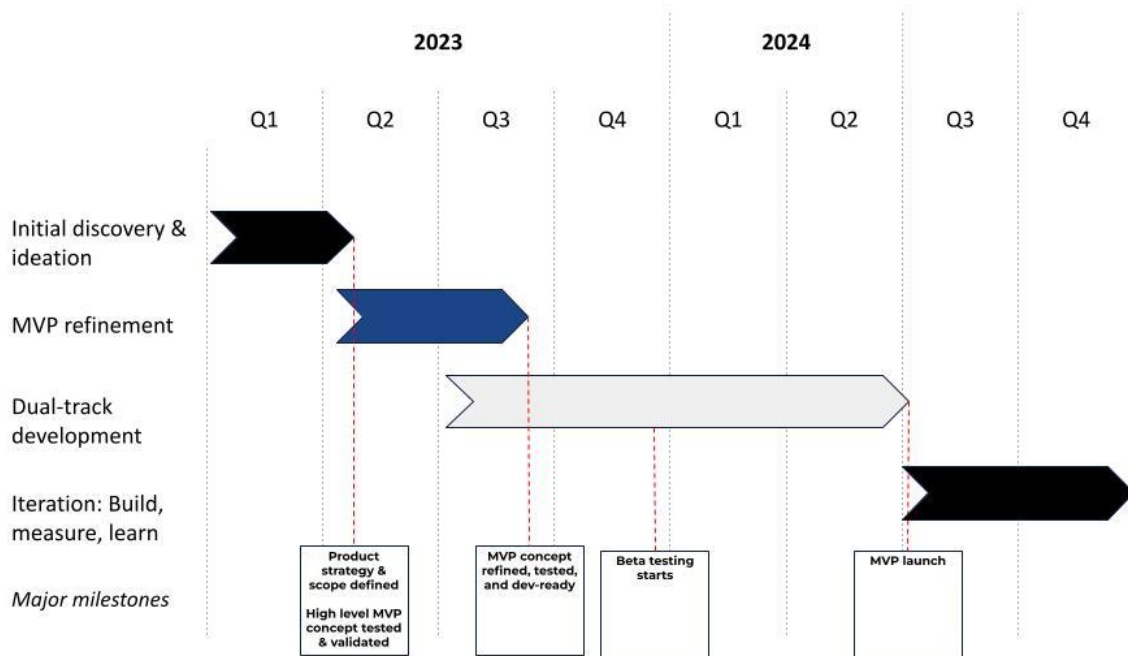
## Product development scope

EdFuel is looking for a developer (individual or agency) experienced with lean approaches to product development and can embrace an environment where we will be iteratively building, measuring, and learning.

### Responsibilities:

- Select and implement a platform that will sustain and scale beyond MVP
- Design and implement back-end architecture
- Implement a mobile-responsive (optimally mobile first) front-end application that meets product & user objectives
- Collaborate closely with the EdFuel product lead, other EdFuel stakeholders, and designer(s) to define new features and functionality
- Develop rapid prototypes for testing purposes
- Enable alpha & beta testing prior to launch
- Enable behavioral data tracking & collection
- Enable performance and bug monitoring
- Enable ability to localize strings
  - Language at launch will be English only. However, we anticipate needing to localize downstream - this is to futureproof.
- Ensure accessibility standards are met (at least Section 508 compliant; WCAG 2.1 or latest standard at the time of launch)
- Ensure compliance with CCPA at minimum, optimally GDPR
- Deploy, monitor, and maintain builds
  - An SLA will be developed and signed during the course of this work
- Create documentation & specs as needed for all stakeholders and for future scaling, expansion

## High-level timeline



## Project management & team collaboration considerations

This will be approached like an in-house SaaS product engagement. You can expect:

- A collaborative “triad” of product management, design, and development
- A 2-week sprint cadence, including regular standups, / check ins, sprint planning, and retrospectives
- Communication over Slack
- Co-design engagement with product, design, dev, & other EdFuel stakeholders, meaning participation in ideation, solutioning, and prioritization; also occasional presentations.
  - The product lead will be the primary point of contact with EdFuel, but there will be engagement with the broader team.
- Data- and criteria-driven decision making

## Evaluation & selection criteria

EdFuel is seeking experienced SaaS designers & developers familiar with human-centered design, continuous discovery, and dual-track agile to support this launch.

### UX Design

- Significant experience defining and validating consumer-facing SaaS user experiences [from structure through surface](#)

- Experience with human-centered design and development methodologies
- Familiarity with dual-track design/discovery
- Background in collaborating closely with development & product management
- Demonstrated commitment to diversity, equity, inclusion, and antiracism (DEI&A)

### Development

- Significant experience building consumer-facing SaaS user experiences
- Experience with human-centered design and development methodologies
- Familiarity with dual-track design/discovery
- Experience with rapid prototyping and A/B testing in software
- Background in collaborating closely with design & product management
- Lean & agile approaches to development
- Experience with enabling data collection & analytics that protects PII
- History of building solutions that include architecture, back-end, and front-end development
- Demonstrated commitment to diversity, equity, inclusion, and antiracism (DEI&A)

### **Intellectual Property & ownership**

EdFuel will own all intellectual property from this project.

When the project is complete, all credentials, source code, documentation and any other artifacts / dependencies for the operation of the application will be turned over to EdFuel.

### **Proposal requirements**

Please provide a proposal that follows the template below and submit to Kristina Campa-Gruca ([kcgruca@edfuel.org](mailto:kcgruca@edfuel.org)) by Friday, April 28, 11:59 PM PST.

#### Contractor profile

- Full name, organization/business name, email, telephone number, website
- Primary contact name, title, telephone, email
- Describe your work and organization - history, the primary focus of work, years in operation
- Indicate if you are bidding for design, development or both
- List additional support staff, if any, that would be assisting in this work

#### Client & reference information

Please provide three (3) references (name, organization, email) that you have worked with on comparable projects.

#### Process & philosophy

Describe your approach to software design and/or development work (depending on which you are bidding).

This should include but is not limited to:

- How you approach design/dev through the lens of human needs.
- How you collaborate with other partners in the product process (product management, design, development, data)
- Approach to the build, measure, learn cycle & creation of feedback loops for test & validation
- (Development) Approach to selecting a platform and architecture that meets organizational & user needs
- (Development) Approach to developing stable, scalable, data-and-PII secure products
- Your approach to diversity, equity, inclusion, and antiracism (DEI&A) in product
- How you approach escalations that arise during the course of development

### Portfolio & case study

Please provide a case study of recent software design/development from definition through launch & iteration that best illustrates your fit to the requirements in section “Product Scope”.

Please also provide 2-5 additional work samples you feel best illustrate your approach to product design & development.

### Scope of work

Provide your proposal to complete the work, including:

- Phases & steps
- Key milestones, decision criteria, dates
- Stakeholders involved in each stage
- Final deliverables

Design proposals should also include:

- Tools for prototyping
- Research methodologies
- Tools for documenting specs & what a spec for development will include
- How many designers you will assign, their roles & location (on- vs offshore)

Development proposals should also include:

- Where you propose hosting the app (AWS, Google Cloud, MS Azure)
- Proposed SLA
- Proposal for ongoing maintenance beyond MVP + 6
- Tools for documentation & specs
- Tools for rapid prototyping in code & A/B testing
- How many developers you will assign, their roles & location (on- vs offshore). Who will the dev lead be?



- Can you execute this work without subcontracting to another firm?
- How you will protect PII (including but not necessarily limited to compliance with data regulations). How do you enable processor vs controller permissions?
- Your security credentials (SOC2, ISO27001, etc) & willingness to be part of a third party security audit
- Proposal for data capture, storage, resilience, and presentation.

Fees

Please provide a range of cost proposals to accomplish the outcomes detailed above, including whether all-inclusive or whether travel & other out of pocket expenses will be billed separately, and billing frequency.

EdFuel has allocated \$175,000 for this project to cover both design AND development through MVP + 6 months (anticipated end of 2024).

If you are bidding for only design OR dev, please adjust your response appropriately. We will allow responses to exceed \$175K if there is incremental support proposed.

Ongoing development maintenance will be required beyond 6 months and will entail a contract extension. Developers should include maintenance cost projections past 6 months in their bid, but please be aware the initial contract will be for MVP + 6 months.

(Optional) Other information

- If there is information you would like us to have about your services that is not covered in the template above, please include it here.

**Timeline**

RFP posted	March 28
Deadline for questions	April 10
Final submission deadline	April 28
Finalists informed	May 10
Finalist interviews	May 15-19
Notification of vendor selection	June 5
Work starts (design portion)	June 19