**Website design/development brief**

Although this looks like a lot of work, filling it in properly is time very well spent – and it will certainly save you a lot more time and money throughout the project. Remove all of these light grey guidance notes and replace them with your answers.

You don’t need to fill in this form just for our purposes. The thinking you’ll do here will be extremely useful to whichever agency or freelancer you ultimately choose to work with.

## About us

Use most of the rest of this page to tell us about your charity. You’ve probably already got some ‘About us’ text you can copy and paste here. We’d be interested to know what your biggest sources of income are, or any big plans for the future – so the new site can support these goals.

## What makes us different?

Why should a donor give money to you and not one of your ‘competitors’? Capturing the essence of your ‘story’ and what makes you unique/special is often the key to making a really compelling website.

Our current website

Website url:

Approx number of monthly visits/sessions: (check your Google Analytics if you use it)

Approx year it was built:

Which CMS does it use (if known):

How we drive traffic to the website: Facebook/Twitter/Email newsletters/Physical events/Google Adwords Grant

What we like / works well on our current site

Let us know if there are any aspects or functionality of your current site that work well and that you’d like to retain.

Issues with our current site – from a staff/charity perspective

E.g. hard for staff to update the site not enough of them are trained, the CMS has a big license fee, the current web agency don’t provide a good service, there’s not enough templates to choose from, it’s hard to download data from it etc.

Issues with our current site – from a website visitor’s perspective

E.g. it’s not mobile-friendly, the design is very dated, it’s hard to find the right content, it doesn’t inspire people to donate or sign-up etc.

Why now?

What has prompted you to develop a new website. Why now, not this time next year? What’s the main reason you’re biting the bullet and investing in a new site now?

Aims of the new website – what does success look like?

You’re investing a fair bit of time and money into building a new website, so you should have an idea of what return you hope to get from that investment, even if it’s hard to quantify it in exact pounds and pence. When the new site is in place, how will things be different? More people will come to your events? You’ll be able to free up fundraiser staff time by automating some processes, people will engage with the site more (lower bounce rates, higher time on site). More staff will be able to update the site etc.

Website content

Let us know how you plan to fill the site with content. Are you planning to bring across content from an existing site or start afresh? What staff resources have you got allocated to creating/refreshing the content for launch? Who will be creating content on an ongoing basis after launch? How often? (Be realistic here!) What are the different types of content you have identified that you will want/need (news, events, blog, project updates, case studies etc).

Images

Do you have a stockpile of good photos to use on the new website? Are there child protection or confidentiality issues that make using photographs a challenge?

Target audience

Who are the main external stakeholders of the website? Try to be more specific than ‘the general public’.

This is really important – we need to plan ‘user journeys’. Need a strong idea of what you want people to do when they come to the site

|  |  |  |  |
| --- | --- | --- | --- |
| Audience | Desired Action 1 | Desired Action 2 | Desired Action 3 |
| e.g. potential marathon runners or challenge eventers | Easily see on the site a list of events they can take part in | Register their interest online and possibly book a guaranteed place | Get all the information they need without having to email staff with questions |
| e.g. Trusts and Foundations | Get an overview of our work, history, finances and other funders | Be more inclined to look favourably on a grant application because we look credible and professional |  |
|  |  |  |  |
|  |  |  |  |

Brand guidelines

Let us know what you’ve got in the way of branding materials. Do you have a set of branding guidelines? Are there colour palettes that you want to use, or is your only ‘brand asset’ your logo?

Website functionality

The more specific you can be here, the more accurately we can quote the project. E.g don’t just say ‘Events functionality’. Where are the evets held? How often?, do you want people to be able to book tickets online? Are they free or paid? Do you use something like Eventbrite to manage the event? Do you need an events calendar?

Is there some content that you only want certain people to see?

Can visitors create an account on the site?

Requirements

If there are any ‘must-haves’ for your new website then list them here. Things like ‘mobile-friendly’ or ‘must integrate a Twitter feed’ are taken for granted. But if you only want to use an open-source CMS, or you have other software like a CRM system or third-party websites that you need to work with, then let us know here.

Budget

[See the guidance notes in our blog post](https://www.charityandbiscuits.com/blog/free-template-charity-website-design-tender-rfp-document/)**. We highly recommend that you put *something* here**. Put in a budget range if you’d rather not give your maximum figure. Remember to say whether you’re allowing for VAT or not.

Websites we like

List some websites who have some design or functionality elements you like, in relation to your prospective site. **Let us know what it is you like about them**. Try to steer clear of personal preferences – we’re looking for what will work best for the charity’s new website.

Do say ‘we like the donation form on this one because it is on one page and it looks clean and professional’. Don’t say ‘I like Facebook because you can message friends on it’. These don’t have to be your ‘competitor’ charities, or even other charity websites at all.

Websites we don’t like

Similarly, let us know of any websites with a design or functionality that you actively don’t want your site to draw inspiration from. Again, let us know why you don’t like them.

Ideal Timeline

If there’s a date that you’d like the website to be launched by, or any other important milestone dates then let us know.

Response required

Let us know who to send the response to, and the deadline for doing so. We strongly recommend that you do not ask for potential design ideas as part of the proposal. [See the blog post](https://www.charityandbiscuits.com/blog/free-template-charity-website-design-tender-rfp-document/) for the reasons why. The best approach is usually something like ‘We would like to receive written proposals by (deadline date and time) which outline your approach and your suitability for the project. We will then follow up further with a shortlist of selected agencies/freelancers.’

We’d love to see what you come up with. Send us a copy to ben@charityandbiscuits.com