



Intermediate Solicitation No. PKS-CM-2022-01

PERSONAL/PROFESSIONAL SERVICES - COLLEGE WEBSITE RE-DESIGN SERVICES

**** Responses Due: March 22, 2022, prior to 3:00 pm, Local Time ****

ISSUE DATE: March 7, 2022

ISSUING OFFICE: Purchasing/Communications & Marketing

SOLICITATION COORDINATOR: Jules DeGiulio
Purchasing Manager
Office: 541 440 7640
Cell: 541 510 2937
jules.degiulio@umpqua.edu

TECHNICAL CONTACT: Suzi Pritchard
Director of Communications and Marketing
Office: 541 440 7658
suzi.pritchard@umpqua.edu

HOW TO SUBMIT:

Send to the **Solicitation Coordinator**. Preference is for .pdf attachments to an email. If USMail or a Carrier is used, a thumb drive is all that is required. Hard Copy is not necessary. Send to:

Umpqua Community College
1140 Umpqua College Rd
Office of Business Services, Purchasing
Roseburg, OR 97470
Attn: Jules DeGiulio

ANTICIPATED TIMELINE:

Issue Date:	March 7, 2022
Proposals Due, Date/Time:	<u>Prior to 3pm, local time: 3/22/22</u>
Q&A:	9am 3/9 thru 3pm 3/16/22
Evaluation Period:	3/22 – 3/25/22
Interviews, if needed:	3/28 – 3/31/22
Award Announcement:	4/1/2022
Contract Prep & Execution	4/1 – 4/6/22
Project Start Date:	4/7/22
Project Go-Live Target:	12/1/2022

This timeline is UCC's best estimate. UCC reserves the right to revise as necessary.

Contents:

- Section 1: Summary/Schedule
- Section 2: Background
- Section 3: Project Requirements
- Section 4: Submittal Requirements & Selection Criteria
- Section 5: Solicitation Conditions & Contract Terms
- Exhibit A – Submission Form

Section 1: Summary/Schedule

Summary: Umpqua Community College requests Firm and Staff qualifications along with a competitive offer to redesign the umpqua.edu website and its content. UCC will award an exclusive Personal Services Contract (PKS) based on criteria met in response to this solicitation.

Timing: April project start and December launch. Dates to be defined based on launch requirements.

Budget: \$100 - \$125k

Section 2: Background

Umpqua.edu is the destination for all college advertising, programs content, and admissions functions from enrollment to community connections. Engaging prospective students is the number one goal – ensuring the UCC website is easy to find, easy to know, and makes it easy to enroll.

The website is vital to engaging with our community and college operations. The substantial growth of content has occurred over time without a single “owner,” which has resulted in a collection of pages that are out of date, difficult to navigate, and maintain. Over 60 web authors create and maintain content. 20% of prospective students will look away from a college if they have a negative experience on a website (*Inside Higher Ed). Some of the challenges include:

- Navigation consistency, redundant content and an attempt to serve multiple audiences.
- A mixture of content both internal and external content on the external website.
- Broken functions such as the topnav and search due to an outdated platform.
- Advertising activities are hindered due to the lack of a destination for cohesive content.

Existing Technology Stack

<p>Frontend Frameworks CSS/LESS/SASS Bootstrap</p> <p>CMS Joomla 3.x / 4.x PHP 7</p>	<p>Server Nginx SSL</p>	<p>Integrated or Linked Technologies</p> <ul style="list-style-type: none"> • My UCC intranet web content • 25 Live Calendar • Tag Manager / Analytics / Fonts / Maps / YouTube / Captcha/ Search • Canvas by Instructure • Panopto • Constant Contact • SharePoint • Personnel Directory • Content/Code Includes • Social Sharing • Sitemap • Active Directory/SSO 	<ul style="list-style-type: none"> • Microsoft Exchange • Facebook pixel • Intersection Observer • FloC Opt-out • SPF – Sender Policy Framework • UIKit • Embedded Youtube • Knowledge base plugin application used for jobs content display https://umpqua.edu/student-job-placement/
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Estimated current scale of website content:

- Estimated 300 – 500 webpages need reformatting to new templates
- Sitemap of all ~700 website pages will be provided upon request for this RFP. Some of these pages will be consolidated or EOL in the design process.
- Additional ~8000 pages have been identified as orphaned, internal, or dated content and will be considered as redirects.

Goals and objectives

Modernize and up-level the website's image to reflect the high-quality of education of our faculty and staff, and campus. The number one goal: clean up the architecture, content, and provide a clear pathway to learning for our students and community.

1. Prospective Students: Request Info, Visit, Apply
2. Current Students: Retention
3. Community: Engage, Visit, Signup
4. Alumni: Signup, Engage, Give

Section 3: Project Requirements

Specific requirements to help accomplish this goal include the following numbered areas.

In response to this Solicitation, the responding firm will define the following:

1. Analysis of website audiences and content

The design approach for the user and research methods recommended for this project.

- a. Define information architecture for customer journeys: Credit/Transfer student, Non-credit student, Community, Workforce, Adult Basic Skills, Alumni
- b. Provide information architecture and structure for improved search engine optimization (SEO) and navigation for content across the website.
- c. Establish consistency for user journeys, including steps for reaching applications: admissions, adult basic skills, and various programs across the website.
- d. Connect students to value-added services early in the enrollment process. (Scholarships, degree partnerships, Trio and student support services)

2. Content management platform

The preferred and recommended tools, plugins, technologies to be used.

- a. Establish recommendations for server location for secure cloud-based hosting. UCC to secure the server location based on agency recommendation.
- b. A development server provided in addition to the live publication server.
- c. Plan to mitigate security risks/issues with templates and plugins utilized in the project.
- d. Capability to utilize single sign-on for editors and employees, current users
- e. Permissions for managing multiple users and restricting access at directory levels and content parts of templates.
 - i. General user, Staff, Administrator
- f. Establish new web applications: Forms, embedded video player (YouTube), on-site search engine.
 - i. Form data: Automated option for exporting data. Future option to integrate with future CRM.
- g. Site must be flexible to allow custom font selection to reflect the brand without cost from Google fonts: current font used is Hind Guntur but may change in the future.
- h. Organization system of folders for images and files.
- i. Time tracker notification system for webpages to ensure pages are kept up to date, possibly by academic term (4 times per year).
- j. Capability to integrate with external web applications such as Raiser's Edge or Stripe (donation payment applications), Google products, current map JavaScript /map, enrollment applications, and a 25Live event calendar that utilizes JavaScript modules.
- k. On-site search engine
- l. Tool for managing on-site SEO.

3. Template Design

The approach to new template development. For example, define if custom-coded templates would be created, or an existing template be purchased and customized for UCC.

- a. Agency provides 3 options for the design, allowing up to 3 revisions or edits for the selected option.

Design considerations:

- Highlight our campus, our students, and how we serve the community.
- Modernize the look and feel in compliance with accessibility standards and responsive design
- Establish a login area for Students / Faculty / Staff to access internal content (security and link provided by UCC)
- Prominently position main goals of the website - prospective students: Apply, community/student engagement: Visit and supporters: Give.
- Accommodate emergency banner on the homepage for alerts. Capability to handle multiple headers and hero image layouts for flexibility.
- Modernize forms and interface with the user in providing a service while collecting information.
- Adhere to WCAG accessibility standards to level AA, CAN-SPAM, and U.S. Cookie Law

4. Content development

- a. Recommendations for professional presentation, and writing/editing of copy for the audience and SEO will be provided by the agency. Draft copy, images, and photos, from the existing website will be provided by UCC.
- b. Create standards for page content and identify recommended page content. Examples: Program description, financial support, and signup need to be separated and easily accessible for various user journeys, eliminating duplicate content.
- c. Responsive design and consideration for mobile-friendly templates. Example: Reformat existing tables to mobile-friendly CSS code.
- d. Pages migrated include on-page SEO functionality for the title, heading, description, alt tagging, and open graph functionality (to facilitate social sharing).
- e. UCC will identify internal content and post the internal content to the intranet. Move internal content for the audience of staff/faculty to an intranet.
- f. Standard Privacy Policy provided by the agency.
- g. Jobs content that exists in the current knowledge base plugin application will be migrated by UCC: <https://umpqua.edu/student-job-placement/> (Agency to provide new plugin solution)

5. Technical development

- a. New templates and web applications installed by the agency.
- b. Agency provides recommendations for transition plan from the old website to the new website, content migration, and handling of orphaned content, including images. Redirects set up by the agency.
 - i. Images and files follow an organized system defined by the Content Management Platform part of the project.
 - ii. Agency will transfer images and link content from the old website to a new document library.
 - iii. Agency exports and uploads the new sitemap for the website for the purposes of SEO.
- c. UCC to set up user permissions, Google Analytics, Tag Manager and Facebook tracking code.
- d. Existing related external websites and tools will need to be integrated. (Out-of-scope for redesign):

Campus monitors (/getting-started)

Library website

Bookstore website

CourseLeaf website

Athletics website
Banner (Admissions enrollment)
Enrole (CWT course website)
Calendar (25 Live website)
Tickets website
Intranet (myucc - migrated by IT staff to supplemental internal website)

6. Added features

- a. Customized homepage/content served is based on audience. Show audience view-based behavior or from previous site visits for three primary audiences: Current Student content vs. Prospective Student or Community member. Example: Current student view could be shown for students that previously logged in.
 - i. Alternative: Allow the audience to select or save their choice of homepage view.
- b. An approval system and workflow within the development server are highly desirable for managing content editing with multiple authors.
 - i. Workflow approval system example: Editor > Supervisor > Marketing > Final Approval to Publish

7. Testing, quality assurance, and launch

- a. Agency to define requirements for Migration Plan.
- b. List access and requirements needed to set up the draft website and new website.
- c. Define technical plan for migration of content to new platform and templates.
 - i. Transition plan software (such as Updraft Plus), technical support and time needed to minimize disruption to enrollment or student impact.
- d. Plan for EOL or redirecting old content

8. Training & transition to UCC maintenance

- a. Website overview and technical functions review with up to 4 team members
- b. Documentation outlining CMS functions and any special considerations for long term maintenance
- c. On-call technical maintenance questions for up to 5 hours and occurring up to 6 months after launch
- d. Future-proofing: Long-term, multi-year recommendation, and requirements for maintenance of tools and technologies used in the project.

Section 4: Submittal Requirements & Selection Criteria

The selection process will be based on the information submitted, obtained, received, presented, found, and heard in response to this Solicitation. Responses to this Solicitation should include the items listed below and others as the Offeror deems relevant to their offer. The College will be the sole judge of the merits of each submission.

1. **Agency:** Brief background of your agency. Short description of key personnel that will be assigned to the project. Identify any personnel that will be sub-contractors.
 - a. **Complete and sign Exhibit A, the Submission Form** and attach your firm's current and signed W9.
2. **Qualifications:** Work samples showing similar project experience. Three references with email and phone numbers. (References may or may not be contacted.)
3. **Project Requirements:** Describe the approach used to accomplish "Section 3: Project Requirements." List each item and identify your experience or areas that are unknown. Include a high-level estimated timeline for Analysis, Platform, Design, Development, Migration, Testing, and Launch.

4. **Cost: Provide a detailed list of project pricing** including future costs of ongoing maintenance or estimated cost of any tool subscriptions.

- This table provided is an example only and should not be considered complete. Provide the best and most detailed cost breakdown possible.

Task	Phase	Cost
1	Analysis	\$
2	Content Management Platform	\$
3	Design	\$
4	Content Development	\$
5	Technical Development	\$
6	Added Features	\$
7	Testing, Quality Assurance, Launch	\$
8	Training	\$
		\$

5. **Q&A:** Questions are permitted only when submitted in writing and by email to the RFQ Coordinator. All other forms of communication are considered unofficial, non-binding, and will have no bearing on this Solicitation or the resulting contract. Questions will be accepted between **9am 3/9 thru 3pm 3/16/2022** and will be answered no later than **5pm on 3/17/22**, sufficient time to complete your offer by submittal time
6. **Interview/Presentation:** On the basis of the initial evaluation, the College *may* extend invitation(s) to interview/present to the Contractor(s) determined to be best qualified. Interviews may be in person, by ZOOM, or telephone as possible. If necessary, they will be scheduled between **3/28 and 3/31/22**.

Section 5: Solicitation Conditions, Submission Process, & Contract Terms

The College will use a **PERSONAL SERVICES CONTRACT (PKS)** and related process to bind this work.

A contract for “**Personal Services**” is a public contract that calls for specialized skills, knowledge, and resources in the application of highly technical or scientific expertise, or the exercise of professional, artistic, or management discretion or judgment. Qualifications and performance history, expertise, knowledge and creativity, and the ability to exercise sound professional judgment are typically the primary considerations when selecting a Personal Services Contractor. While cost is certainly an important factor, it is considered secondary to the applicable skills and abilities.

GOVERNING STATUTES, POLICIES, & PROCEDURES:

- Oregon Statute **ORS 279A.05** - Personal Services Contracts.
 - Community College Rules of Procurement, (CCRP), Version 1.8 - Rules **CCR.312** and **CCR.250. (4)(z)**
 - UCC's **BP-6340** and **AP-6340** – Bids and Contracts.
 - UCC's Purchasing Board Policy and Administrative Procedures: **BP-6330** and **AP-6330**.
 - UCC's Administrative Procedure, **AP-6370** – Contracts/Personal Services.
- The contract shall be fully executed, (signed by both parties), **prior to the work beginning**.

OWNER'S RIGHTS:

The College reserves the right to (1) reject any Offer not in compliance with all prescribed public solicitation procedures and requirements, (2) add to the price proposal by non-resident offerors an increase equal to the percent preference that the non-resident offerors home state would give its in-state offerors, (3) reject for good cause any or all proposals that are not in the best interest of the College, (4) waive informalities in the offers, and (5) select the offer which is discerned to be in the best interest of Umpqua Community College.

HOW TO SUBMIT:

Offers will be accepted by Jules DeGiulio, Solicitation Coordinator per the schedule listed.

Preference is for .pdf attachments to an email. If USMail or a Carrier is used, a thumb drive is all that is required. Hard Copy is *not* necessary. Send to:

Umpqua Community College
1140 Umpqua College Rd
Office of Business Services, Purchasing
Roseburg, OR 97470
Attn: **Jules DeGiulio**

- Offers *must* arrive **prior to 3:00 PM local time on March 22nd, 2022**.
- "Late is Late". Offers received after this time cannot be considered.



**EXHIBIT A
SUBMISSION FORM**

**Intermediate Solicitation No. PKS-CM-2022-01
COLLEGE WEBSITE RE-DESIGN SERVICES**

COMPANY NAME: _____

ADDRESS: _____

CITY, STATE, ZIP _____

CONTACT PERSON: _____ **Title:** _____

SIGNATURE: _____

DATE: _____

CONTACT INFO:

DIRECT PHONE: _____

EMAIL: _____

FEDERAL TAX ID# _____

(Attach Current W9)

TOTAL COST DELIVERED AS PER SPECIFICATIONS: \$ _____

By completing and signing this form, the Offeror is confirming authority to contract for their Firm or Themselves and is committing to provide the goods and services requested by the Solicitation if awarded.

End of Exhibit A