

Southwestern University

Request for Proposal

Web Site Redesign

Response Due:
August 8, 2007

For Information, Contact:

Robert Paver
Assoc VP, ITS
Southwestern University
1001 E University Avenue
Georgetown, TX 78626
(512) 863-1676 (voice)
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1.1 Purpose of RFP

Southwestern University seeks a strategic partner to redesign its current web site - www.southwestern.edu. Changes in the University, the competitive marketing environment in higher education, and the emergence of new web technologies are important factors in our decision to redesign our site. The new site should reflect the vitality and passion of Southwestern University, express the University's character and identity, incorporate best practices in web technology and usability, and allow the University's web presence to grow with the institution.

1.2 About Southwestern University

Core Purpose ~ Fostering a liberal arts community whose values and actions encourage contributions toward the well-being of humanity.

Southwestern University is a nationally ranked, independent, selective, four-year undergraduate college. It offers a traditional liberal arts and sciences, values-centered curriculum that focuses on the full development of each student.

The first institute of higher learning in Texas, Southwestern traces its charter to 1840 with the founding of Rutgersville College, the first of four "root" institutions founded by Methodist pioneers. The University comprises The Brown College of Arts and Sciences and The Sarofim School of Fine Arts and offers 38 major programs. Southwestern is the leading liberal arts college in Texas.

Fall 2006 enrollment was 1,277. Nearly half of the Fall 2006 entering students graduated in the top 10 percent of their high school class, and students in this class had a median SAT score of 1240. Minority students represent 23 percent of the current enrollment. Southwestern has a 10:1 student/faculty ratio with 99 percent of the full-time faculty holding doctorates or the highest degrees in their field. University intercollegiate teams compete in Division III of the National Collegiate Athletic Association (NCAA) through membership in the Southern Collegiate Athletic Conference (SCAC).

The Princeton Review included Southwestern in *America's Best Value Colleges* and *The Best 361 Colleges*. Southwestern is one of 40 schools profiled in Loren Pope's *Colleges That Change Lives* <http://www.ctcl.com>.

1.3 Web History

The University launched the first version of its web site in 1995. In the first two years, the Office of University Relations—charged with creating a site geared toward prospective students, alumni and friends—borrowed staff time from ITS and hired a talented student. In 1998, the addition of a position in University Relations allowed us to centralize the operation and increase quality, with a

primary focus on web marketing and management. In recent years, Admission reports have identified e-mail and the web as the largest inquiry sources for the University's applicant pool.

With thousands of active web pages managed by Southwestern University's Office of University Relations, the demands for web development and maintenance have grown exponentially. The University continues to embrace the importance of on-line marketing and envisions a more personalized web experience for site visitors; however, more time is required for maintenance and less time is available for web marketing research and the evolution of new designs and technologies.

Attempting to keep individual departmental sites dynamic, "personal," and forward-looking presents numerous challenges. In an attempt to meet immediate needs, the University currently is outsourcing sections of the web site devoted to Athletics and Alumni Relations. The Athletics department has a contract with CSTV to host its web site. CSTV provides a framework and templates that are attractive and easy to update. The Alumni Relations site, www.sugrads.org, is also hosted remotely and is a custom application developed by NeoFirma. The site features an alumni directory, alumni profiles, a photo gallery and class notes. Pages are maintained using *City Desk*, a PC-based application.

1.4 Marketing Strategy

The University identified the following marketing goals:

- To determine attitude/awareness/knowledge of key constituents - internal and external
- To align perceptions with the University's mission/strategic goals
- To develop communications and image goals
- To strengthen collaboration and ownership among stake-holders
- To support the University in achieving its envisioned future

Subsequently, a marketing firm was retained by the University. It made a number of additional recommendations that will influence the design of the new web site. These recommendations are incorporated in the Goals and Objectives section below.

Goals and Objectives

2.1 User experience

Improve the design and navigation of the top levels of the web site so that it is interactive and responsive to users, while representing the university in a consistent and compelling manner. The goal is to improve the experience of all users - with special emphasis on prospective students.

2.1.1 Integration with External Sites

As described in section 1.3, the university's athletics and alumni web sites have been outsourced (to CSTV and NeoFirma respectively). Your proposal should address the advantages and disadvantages of outsourcing these sites and make recommendations about their future and the proper integration with the main site.

2.1.2 Navigation

Appealing, intuitive and consistent navigation is essential in any web site. Given the need to appeal to prospective students, the navigation framework should make it easy to find or return to pages of interest to prospective students. However, navigation for others must not be compromised.

2.1.3 “Sticky-ness”

Effectively attract and capture prospective students, with the intent of producing return visits and increasing time spent on the site.

2.2 “Search”

Ensure that users find relevant content by optimizing the search GUI and enabling content prioritization. Our current search solution does not search our externally hosted sites which is problematic. Review and make recommendations regarding technical features such as a refined searching process (up to and including the use of a search appliance). The proposed content-generation method should support keywords and tagging.

2.3 Branding

Two things that make Southwestern University a special place are the quality of the faculty and the depth of their engagement with students. Alumni remember and value the intellectual relationships that they had with the University's faculty. Similarly, prospective students are attracted to the opportunity for such an experience. To capture the essence of these powerful relationships, we have adopted "Engaging minds - Transforming Lives" as our branding statement.

2.4 Interactivity

A highly interactive web site is desired in order to enhance the "sticky-ness" described in 2.1.3 in addition to increasing the overall productivity of the current site for both site visitors and the University. The latest interactive technologies should be utilized, where appropriate, to support functions such as: e-commerce transactions, search (see 2.2 above), virtual tours, photo galleries, video and sound files, blogs, etc.

Where practical, the site should "learn" from its interactions with each user and adjust accordingly to make future interactions more effective and engaging for that individual. The site should readily promote and coordinate interactions that cause site visitors to identify themselves to the University. These interactions include, for example, scheduling campus visits, applying for admission, or communicating with the alumni office.

2.5 Enhance and emphasize the recruitment process

Information for prospective students and their families should be prominent and easily accessed from a variety of locations within the web site. The design of the admission pages should appeal to 16-18 year old students yet integrate smoothly with the overall design of the site. Providing contact information should be encouraged, easy and secure.

2.6 Consistency of look and feel

The overall look-and-feel is to be consistent across all newly designed pages in the primary pathways through the site. The University intends to highlight its academic programs. To that end, individual departmental web sections will be easily located and use the University's overall page format, while allowing alternate and unique elements to meet departmental needs.

2.7 Consistency of data/information across similar pages

Categories of information available on pages of similar departments (e.g., academic departments) are to be consistent. Additional categories may be necessary for individual departments to meet unique needs.

2.8 Simplified maintenance of site

Maintenance of the Southwestern web site should be intuitive and simple for all levels of content editors. The architecture of the redesigned site must be robust yet flexible to allow for its evolution over time. The proposed design should provide opportunities for better management of content.

Southwestern University may issue a subsequent RFP to acquire a CMS. If your proposal recommends the deployment of a content management system, it should

also include a rationale for a CMS and include information about CMS products with which your firm is proficient.

2.9 Portray the beauty and vibrancy of campus

The beauty and vibrancy of Southwestern's campus should be immediately apparent through the site's images of the campus, including prominent displays of students engaged with each other and with faculty. A new virtual tour is needed that might involve both video and audio commentary from student "tour guides."

2.10 Search Engine Optimization

Southwestern University currently enjoys favorable placement in search engine results. We obviously wish to maintain or improve our rankings by the popular search engines. The design of the site and the supporting technology should facilitate search engine optimization.

Requirements

3.1 Server

The University has substantial experience in managing web services running on Apache web servers hosted on Unix/Linux operating systems. Additionally, we maintain MySQL and PostgreSQL databases which are utilized by local custom web applications. The proposed design should integrate well within this type of environment.

3.2 Standards

The document type for the templates (pages) will follow the W3C standards for XHTML Transitional and must validate against that standard. Usage of non-XHTML tags, attributes or code must be preapproved and documented. Use of non-standards-based code and browser-specific tags or technology will not be accepted.

3.3 Mobility

The increasing popularity of web-enabled mobile devices leads us to believe that many users of our website will be using mobile devices with small screens. Though we want to take advantage of higher resolution monitors with vivid photography for desktops, we want to offer a good experience for mobile users too. We request that this be addressed in the proposal.

3.4 Accessibility

Southwestern University is committed to providing a meaningful web experience to everyone that visits our site. Proposals must address web accessibility requirements outlined in US. Section 255 guidelines and Section 508 standards, as

well as Web Content Accessibility Guidelines 2.0 (WCAG 2.0) issued by the W3C consortium.

3.5 Cross Platform

The proposed design must be fully functional for all common browsers (Internet Explorer, Firefox, Safari, Opera, etc.) and operating systems (Windows, MacOS X, Linux, etc.). We will not utilize browser or OS-specific technologies which will inhibit functionality. Adherence to adopted standards is a must.

3.6 Security

The technology used to implement and support the proposed design must be inherently secure. All steps must be taken to choose technology which has a solid security model. Secure programming/coding practices should be followed. Current technologies which have a fast response rate to discovered security vulnerabilities will be favored. Please indicate how your proposed design and chosen technologies address these concerns.

3.7 Web 2.0 Enabled

Though we understand that "Web 2.0" is a loosely used and poorly defined term, we are very interested in a design and technologies which embrace or allow for future use of Web 2.0 functionality. For example, social networking, blogging, tagging, wikis, etc. are technologies that we would like to consider for our site at some point in the future. Describe how your design will allow for this, and make recommendations for inclusion of them into your design.

3.8 Event Calendar

We currently have multiple calendars which do not integrate. Our administrative staff use Meeting Maker for group scheduling. Room and resource scheduling is done with Scheduler Plus (SPii). Faculty and students use a variety of other calendaring tools.

While solving the campus calendaring dilemma with a unified solution is desirable, our immediate requirement is to provide a web-based view into events on campus. These events would include sporting events, invited talks, fine arts performances, organizational meetings, etc. The event calendar should have internal and external (off-campus) views and have the ability to sort and filter events. Posting of events should be allowed for any student, faculty member or staff member with a flexible editorial/approval workflow.

3.9 Staffing

The University's web site is primarily maintained by the Director of Web Development and Communication who is part of University Relations. ITS

provides custom CGI programming as needed and is responsible for the operation of the servers. It is generally understood that the University lacks sufficient resources to maintain the type of web site that it desires.

Your proposal should include an assessment of current resources, including staff, hardware and software. The proposal must also include recommendations for staffing sufficient to support the new design with special attention to the demands of managing distributed content generation and editing and the maintenance.

3.10 Flexible Templates

The proposed design should be modular and structured in a manner that allows for simple modifications to the design without repetitive editing across the site. Additionally, it should be easy to create new templates/designs as needs arise. Please describe in detail the processes involved in making such changes.

Deliverables

- 4.1 A clearly defined statement of web design strategy for the University that can be applied consistently across departments.
- 4.2 A site audit describing the strengths and weaknesses of the University's current web site, including findings, analysis and recommendations.
- 4.3 A new design including original artistic elements (color, graphics, icons, layout, logos, images and templates), storyboards, creative treatment, and color palettes for multiple design concepts that effectively communicate our brand.
- 4.4 Design standards and a plan for implementing them consistently.
- 4.5 Minimum of three (3) site design concepts.
- 4.6 Detailed production schedule listing milestones.
- 4.7 Complete design and respective coding for the home page.
- 4.8 Complete design and respective coding to be used on interior page templates.
- 4.9 Complete design and respective coding of the following specialty sites:
Admissions, Fine Arts, Alumni.
- 4.10 Complete documentation including style guide suitable for general campus use.
- 4.11 Detailed line-item cost breakdown (see Pricing in section 6).

Timeline

5.1 Schedule

Activity	Date(s)
Release of Invitation to Bid	June 18, 2007
Bidder's Intention to Bid Due Date	June 21, 2007
Mandatory Bidder's Conference	July 10, 2007
Release of Bid Documents	July 10, 2007
Vendor Site Visits	July 17-19, 2007
Question Submission Deadline	July 31, 2007
Proposal Submission Due Date	August 08, 2007
Bidders' Presentations	August 21, 2007
Selection of Preferred Bidder(s)	August 31, 2007
Begin Redesign	October 31, 2007
Implement Redesign	Summer 2008

Pricing

At a minimum, the pricing schedule should include subtotals for each of the major project elements specified below. Please indicate price for all-inclusive items as well as *a la carte* type services, e.g., website maintenance, design changes/updates, quarterly site review/audit. Each vendor should submit pricing broken down by any additional phases and requirements they determine.

6.1 Research and Analysis

Includes assessment of the University's current web presence, analysis to support and/or challenge the stated perceptions and goals of the redesign project, and recommendations for the University's web presence.

6.2 Information Architecture

Includes site audit, web content inventory, web content model, facilitation of focus groups, and data structure for content services.

6.3 Design and Usability

Includes all artistic elements, concept and storyboards, graphics, navigation, prototypes, wireframes, acceptance testing, facilitation of focus and testing groups, and production of final templates.

6.4 Content Development

Includes identification of new content needs and text for top-level sections.

6.5 Implementation

Includes functional specifications for a product for content management, and recommendations for an implementation RFP

Southwestern University is registered for tax-free transaction status with appropriate regulatory entities and, as such, is exempt from local and state sales and use taxes. Southwestern University will provide a tax exemption certificate to the Selected Bidder.

Prices offered by the Bidder must be firm for a period of 180 days from the Response Due Date defined in this RFP or subsequent addenda.

Submission Requirements

Proposals must include a cover letter and executive summary that states how the proposal meets the University's requirements. The body of the proposal should include the following components:

- 7.1 Overview of all elements of project (i.e., research, user studies, content architecture, advice regarding a content management system, navigation, technical considerations, design, etc.)
- 7.2 Description of the processes to be used, including how and by whom decisions will be made.
- 7.3 Plan for project organization and execution
- 7.4 History of the firm including significant evolutionary events
- 7.5 Biographies of all staff who will be assigned to the project
- 7.6 Timeline for all deliverables, divided into phases of implementation
- 7.7 Pricing structure and/or fees for all deliverables related to the timeline
- 7.8 Payment terms
- 7.9 Names of and contact information for three (3) clients whom we may contact for references. Please provide their site URLs along with detail of involvement for each (i.e., design, development, programming, etc. and whether any elements were outsourced to other firms.)
- 7.10 A list of links to Web site projects completed, by your firm, similar in scope to the Southwestern University project.

Three (3) copies of the proposal must be submitted, in hardcopy, by **4:00 p.m. CDT, August 8, 2007** to:

Robert C. Paver Associate Vice President, ITS
Southwestern University
1001 East University Avenue
Georgetown, TX 78626-6100

RFP Guidelines

8.1 University Commitment

The release of this request does not imply any commitment or obligation on the part of the University or of any of its representatives to accept in whole or in part any proposal submitted.

8.2 Accuracy of Data and Solicitation Changes

The University does not represent and may not be held accountable for the accuracy of University-provided data contained in this RFP. After the issuance of this RFP and before the date set for receipt of proposals, the University reserves the right to make changes to this RFP, including but not limited to its specifications, correct defects or ambiguities or change the closing date for receipt of proposals. In the event the proposal due date is postponed, all vendors shall be notified of the new day and time of proposal submission.

8.3 Notification

Vendor(s) whose proposals are not accepted will be notified after a contractual agreement exists between the University and the selected vendor, or when the University rejects all proposals. Vendors may also be contacted for additional information or clarification of the proposal following the receipt of the RFP.

8.4 Deviation of Proposal From RFP Format

Any proposal that deviates from or contradicts the suggested format, or does not include the level and detail of information that the University requires, or that does not satisfy the timetable that the University has herein established, may be disqualified from consideration.

8.5 Collateral Material

Provide any additional information that you believe to be relevant to this RFP and your capabilities to provide the services requested, e.g., products, brochures, articles in trade journals. Please include no more than three (3) such items. Attach and label as Exhibit A.

8.6 Evaluation Process

The University reserves the right to reject, at any time, any proposal without providing justification to the vendor. The University expressly reserves the right to

refuse to discuss the evaluative criteria or results of the evaluation, and to request additional information from, conduct interviews with, and otherwise interact with, any or all vendors responding to this RFP. The University is making no specific provision for vendor interviews and presentations during the initial RFP process.

8.7 Inclusion of Vendor's Response to this RFP in any Forthcoming Contract

All statements made by vendor in response to this RFP, as well as any oral or written representations, correspondence, or documents provided by vendor and relied on by University, shall be considered binding as contractual commitments in the event that the vendor's proposal is selected. The RFP response will be considered binding upon the vendor chosen.

8.8 Waiver of Confidentiality

This proposal may require the vendor to provide confidential, proprietary, or trade secret information or documents such as methodologies, processes, vendor financial information, etc., to the University. If such information is considered confidential by vendor, the vendor should mark such information as confidential and notify the University in writing that proprietary information is included within the proposal. The University reserves the right to disqualify from consideration any bid that contains information that is marked as confidential by vendor and which the University chooses not to view due to its confidential nature.

8.9 Confidentiality of Information

The University considers all information contained within this RFP to be confidential information of the University. Vendors are requested not to disclose any information contained within this RFP to any other vendor, individual, or organization without the prior written consent of the University.

8.10 Indemnity and Insurance

If vendor's proposal is selected by the University, in whole or in part, vendor hereby agrees to execute without modification (unless approved in advance and in writing by the University) the University's Standard Insurance Requirements and Indemnification Agreement.

Additionally, vendor will agree to fully indemnify, defend, and hold harmless the University against any third party claims that the deliverables produced pursuant to a resulting contract infringe any patent, copyright, trademark, trade secret, or any other proprietary right.

8.11 Vendor Communication and Contact During Bidding Process

By submitting a proposal, the vendor agrees not to contact any University employees regarding this RFP during the bid period (the time between the proposal's due date and when bid award occurs) without prior written approval from:

Robert C. Paver
Associate VP, Information Technology Services
paver@southwestern.edu
(512) 863-1676

Any vendor that fails to comply with this limitation may be disqualified from consideration.

8.12 Consequences of Late Bid

Any vendor who fails to respond to this RFP by the Proposal Due Date may be disqualified from consideration.

8.13 Warranties

By submitting a proposal, vendor represents and warrants to Southwestern University that it has the capability to perform the requirements as stated in this RFP, its proposal and any accompanying documentation. If selected, the vendor hereby represents and warrants that its work and any goods or services provided to the University by or on behalf of vendor will be good, merchantable, free of all material defects, non-infringing and performed in a good and workmanlike manner.

8.14 Intent

It is the intent of the University to review all available options to satisfy its particular requirements as defined in this RFP. This RFP does not reflect in any manner the requester's opinion on any product or service currently available, in its use or possession, or vendor performance regarding such product or services.

8.15 Preparation Costs

Any and all costs incurred by the vendor associated with developing proposals, presentations, demonstrations, or any other activity related to this RFP are the sole responsibility of the vendor.

8.16 Proposal Unbundling

The University reserves the right to choose components of vendor's proposal or seek separate bids for specific components of the RFP.

8.17 Proposal Signature

An authorized company official must sign the proposal. By signing the proposal, the vendor affirms that all representations contained in it are true and complete to the vendor's best knowledge and that the University may rely upon such representations.

8.18 University Contacts

Any questions regarding the format or content of this RFP or the bidding process should be directed to: Robert C. Paver, Associate VP for Information Technology Services, PO Box 770, Georgetown, TX, 78627-0770; paver@southwestern.edu; (512) 863-1676.

8.19 Silence of Specification

The apparent silence or omission within this RFP as to any detail or detailed description concerning any point, shall be regarded as meaning only that the best commercial practice is to be assumed and only materials of the first quality are to be used. Vendor should state any assumptions made within their response to the RFP. Proof of specification compliance will be the responsibility of the vendor.

8.20 Web Site Development Guidelines

Ownership and Intellectual Property Issues

- 8.20.1 All screens, graphics, content, and the look-and-feel developed for the site shall be solely owned by Southwestern University, together with all underlying software, object code, and the like.
- 8.20.2 All intellectual property developed in connection with the site will be owned solely by Southwestern University.
- 8.20.3 If the vendor is bundling or using any prior intellectual property that it owns and of which it wishes to keep ownership, the University will receive a perpetual, irrevocable, worldwide, royalty free, transferable license to the same.
- 8.20.4 Vendor is responsible for securing various rights, licenses, clearances, and other permissions related to works, graphics, or other copyrighted materials to be used or otherwise incorporated in the web site.

Development Process

- 8.20.5 Vendor shall provide a timetable and budget for completion of site, including specific payment milestones as progress is made on site development.

- 8.20.6 Vendor shall provide a mechanism allowing for change of orders by the University regarding the specifications of the site, without change orders resulting in exorbitant extra costs or delays.
- 8.20.7 Vendor will timely provide documentation and source codes for all technology associated with the site.
- 8.20.8 Vendor will train employees of the University to use and maintain the software associated with the site, both initially and at the time of each upgrade.
- 8.20.9 Vendor assumes responsibility for transferring the site including all software to the University's server or host machine.
- 8.20.10 Vendor shall provide commitment to a period of joint beta testing of the site and a subsequent acceptance-testing period during which the University may evaluate the site.
- 8.20.11 The University will have the right to reject the site if it does not meet the designated specifications and the University options regarding corrections at the time of rejection.

Functionality of the Web Site

- 8.20.12 Vendor shall use most current standards of technology in development of the Web site.
- 8.20.13 Vendor shall specify inclusion of user options for low graphics version of the site in order to minimize the download time.
- 8.20.14 Vendor shall specify compatibility issues with all types of browser.
- 8.20.15 Vendor shall specify how the site will be properly integrated with the University's Intranet or other data server architecture.
- 8.20.16 Vendor shall make additions, corrections, and modifications to the site with minimum or no interference with current site operations.
- 8.20.17 Vendor shall specify security safeguards, procedures, and firewalls that the site must contain.

Problems and Corrective Measures

- 8.20.18 Vendor shall fix any bugs and failed links, and provide maximum time for correction of each bug found.
- 8.20.19 Vendor shall agree to insure that software for the site is free of any viruses and disabling devices.
- 8.20.20 The University holds all rights for termination of the agreement and holds the Vendor liable if termination occurs.