ADDENDUM 1

DATE: July 21, 2017

RFP NUMBER: 2017-018

RFP DUE DATE: August 14, 2017

Below please find attached the minutes document from the Pre-proposal meeting held on July 20, 2017. These requirements and clarifications are formally added to Section 5 of the RFP.

Nancy Czarowitz                 Contract Specialist           817-272-7146

SIGNED: ________________________________________________

COMPANY NAME: ________________________________________

UTA Procurement Meeting 7/19/17 8:37am

UTA players: Nancy, Laurie, Deepika, Erin, Daniel, Jeff, Sana, Jason, Bobby, Lee

Opening from Nancy Czarowitz

SUMMARY:
Vendors in the room must sign-in
Vendors on the phone must email Nancy their contact information.
Please send me your contact information so that I know you are here.
Shared Zoom Meeting information
Your response to the University –
Due at 219 W Main by 3pm Mon 8/14 in my office
Do not accept emails or faxes – courier it, mail it or bring it in. They cannot be late.
Deadline for questions is very quick – submitted by 3pm on Monday 7/24
Any communication with the university must come through Procurement unless in
regards to HSP – then contact Laurie Thompson. Her contact information is in Section
2.5.
3.4 section shows how the bids will be evaluated
Be sure to submit everything that is required.
1 printed hard copy
1 copy on flash drive
Section 3.5 – execution of offer, pricing section, proposer’s general questionnaire,
addenda checklist, HSP in a separate envelope.
Awarded vendor will need to provide a COI (Section 4.16) and a CBC letter (Section
4.32).
In regards to pricing – Section 6 –
Tell us if the timeline is realistic – provide a price for completing the project on our
timeline that could require additional resources on your part. Also, provide a price
based on a more realistic implementation timeline to deliver a quality product.
If you have called in – email your contact info to Nancy Czarowitz at
Czarowitz@uta.edu.

Laurie Thompson - HSP
The HSP is a requirement of this project. Two areas - #1 we anticipate the project to be
at least $100k or greater also potential for subcontracting. Let’s discuss the
subcontracting areas and I will send out a follow up email in the next day or two.
HSP is a requirement. You must complete it. If you do not complete it, the RFP will
automatically be disqualified.
If you are a HUB, you must complete the plan.
You have copies of the HSP. This was also included in the RFP as well.
Four methods for completing the plan were discussed.
What is subcontracting – acquiring a good or service to fulfill the contract. So, if you do
not own that resource to the length of the contract.
Nancy: Contract is a one-time project. Once work is complete the project is complete

Deepika Question: If the project is completed as per the defined scope, if we need
additional work, do we have to go through the bid proposal again? It depends on the
Scope of Work and the amount of money. A Change Order is a possibility.
Within the SOW – is this only a handful of sites or all of our sites.
Erin: part of the proposal response is how we would handle the migration.
Homepage, some 2nd level pages and templates are part of the proposal.
We expect the vendor to advise on the other pages or they may offer a way to automate
the migration.
Erin: how do we deal with ongoing work requests
That may require a change order
We are looking for industry best practice advise for automating migration and data mapping.

Back to HSP discussion
..once the award is made; we can make modifications to the HSP but for the initial project that isn’t part of this. Ok? Did – I hope I answered that question. Any changes will be addressed in a modification
For this project, the state requires either in terms of goals there are state goals that associate with an HSP and the university has its own goals. Since the state goals exceed the University’s goals on this project we have to go with 26.0% for other services contract. The page the 2nd page that where it says HSP at the very top. You will need to put 26.0% other services contract.
Everyone completes Section 1 and 2; some of you will complete 3 and all will complete section 4.
Section 1 – general info about your company
We want to know your company name, vendor ID# (same number as Fed Tax ID#), point of contact – we need someone we can reach quickly to discuss the HSP via email and phone. Complete whether or not you are a certified Texas HUB - yes or no; requisition # is the RFP #2017-018.
Responses are due 8/14
That completes Section 1
Section 2
Determine whether or not you are subcontracting or not subcontracting.
Subcontracting is anything that you need to fulfill this contract – goods, services, equipment, materials or tools that you do not currently own.
In Section 2 – ask whether or not you are subcontracting. Mark yes or no.
If you know already that the vendors that you are going to use are all HUBs for subcontracting then the very first option is the one that you can use. Keep in mind that they must be HUBs. Complete the good faith method A - attachment A.
Section A.1 – subcontracting opportunities – mark each one of those give a description of that subcontracting opportunity. Section A.2 list that vendor, their tax ID #, whether or not they are a HUB – they have to be a HUB. What we’re looking at here is approximate $ amount for that portion of the contract and expected percentage of the contract.
…Laurie continued through the examples on the quick checklist.
Example 3 (Method B):
You must notify the HUBS that this opportunity exists. Send email to HUBs with notification sheets. This sheet has everything you need from them.
…discussion of 7 working days of notice to HUBs
…discussion of how to find HUBs, notifications to at least trade organizations and 3 HUBs per subcontracting area
I am available for questions – email or phone. If you want me to review your plan before submitting get it to me 2 days before it’s due – in this case Thursday.
Nancy: For those that called in – Laurie’s contact information is in the proposal and she can answer all of your questions regards HSP. Everyone on the phone must send me
your contact information. My email is in the RFP in section 2.2 – I am the university contact person for this procurement.

3 vendor reps in the room.

**Project Requirements:**
Erin will take the lead in the requirement discussion.

**Statement of Work – of the RFP document.**
Section on objectives at the very beginning.
With this project we are trying to address the webpage so that we are improving the marketability of the university. We would like the website help us increase our student enrollment over time.
We’ve got some recommendation on how we might measure success of the website. Where we don’t have a baseline, we’ve noted that. We are still trying to get more information on how we measure applications to that become students. We will trying to get you some baseline info on the # of abandonments.
We are trying to part of the SOW– develop those measurements so that we can see improvement over time.
Our current sessions, from international – out of state – bounce rates – we will share those numbers to let you know what we are is in our style sheet. We need a company that can help us have a good and updated style sheet dealing with and how we would like to measure success. Improve brand recognition. We are looking for governance inside our website. Utilizing the brand identification that in our style sheet. Looking for a company that can help us make sure we have an updated style sheet as well.
Make sure we optimize our searches and over time looking for this product through templates to decrease the amount of time spent doing development so time is spent on marking efforts instead of custom content development and design.
We’d like to reduce our internal resource time on governance. Instead of having a person/team running accessibility checks or branding checks, we’d like the content management system to assist us with that in an automated fashion.
We are looking for a partner to help us with creating more personalization around key 5 personas – to make sure we address personalization for those 5 personas.
We’d like to make sure that the site we develop is secure.
We’d also like to be able to demonstrate multilingual support – ask for 5-10 pages developed with multi-lingual support so that we can make sure that our support team our development team understands that functionality and can duplicate that over time.
We want to make sure that we improve usability – that we have training for existing active authors – validate an organization structure to support the product over time and campus over time.
We’d like to see updated portals for current students, faculty, staff and administrators. The main purpose is improving enrollment/marketability but we do need to keep our current students/faculty/staff engaged.
Section 5 – Word Document:

**Brand restraints** – updated style guide. Elements like primary color palettes, signatures, things like that would not be intended to change but if we had that is one of the constraints.

Daniel, are there constraints in changing our style guide?
Daniel: We have some core identity guidelines that we want to stick to - Same logo, same primary color palette, key fonts, spacing, things like that – needs to remain consistent.

Erin: The next note is time constraints.
We are looking to demonstrate progress to campus leadership success of iterations, show leadership team that we’re making progress quickly over time.
We’ve been asked to try to deliver this within 3 months. Proposal could demonstrate good progress over the course of 3 months. But we do understand that part of the time frames may not be realistic. We need to understand what we might lose if we don’t take the right amount of time in certain sections of this project. We need to determine how we will show progress in other areas of the project.

**People constraints** – vendors can work offsite but for key activities, we expect our Implementation partner to be on site. So major meetings where we are demonstrating or interviewing, we need our partner on site.

**The process constraints:**
Because we are on such a tight timeline, our team is looking at design work on a fairly iterative basis so that implementation partner is getting feedback very quickly and we can make changes as needed. We don’t want to get to the end of the project and find out that we missed the needs of the campus.

**Technology constraints:**
We’ve referred our vendors to our TAC, Texas State Code and UTSystem accessibility guidelines.
We want to make sure that any artifacts from the project do come back to the university.
We are looking for a partner that is helping us develop within Sitecore as a solution.

**Section Risk:**
5.6 – Risk
Looking for assistance from Implementation partner to give us some information on how we might mitigate those risks.
Delay of the project would be detrimental to our enrollment. Target is that we make our best impression to our students that would start in Fall 2018.
A lot of student activity will get serious after the new year so we want to make sure that we aren’t delaying what they are looking at – home page, admission pages, etc…
It’s always a challenge if we don’t have the right technical resources, the number of people. How might a vendor help us?
Tell us how you will help us deliver this project in a cost effective manner.
Also, if you might have some other risks and how you might mitigate those risks we’d like to see that as well.

SECTION- Deliverables & Scope of Services:
Because of the short timeline, we were thinking of having good discovery and conversations with the campus. At this point, maybe just make sure that our Vendor Partner can give us a good content strategy. We want to do some off-line work to understand those persona journeys. We intend to do some offline work for persona journeys and will share that with our Implementation Partner. We look for our Implementation Partner prioritize key content, by persona, help us with content themes, messages, voice tone, etc. Key pages we’ve identified we’d be looking for headlines and tag line development We know that on some of our key pages we should probably have some workflow to ensure that changes aren’t made to those pages without good oversight. Strategy for dealing with workflow.

Content guidelines –
Strategy for managing for digital assets and making sure we can share that across the institution. Help us produce editorial contact for 10 key pages – we don’t know what those pages are yet but we’re hoping as our IP is looking at some of our key personas the IP could give us some ideas on what those pages should be. As the Implementation Partner looks at our journey maps, the Implementation partner may be able to give us some idea on what those key pages should be. We have a large number of microsites – we need our Implementation partner to give us ideas on how we might address those overtime. ..to create the same look and feel across the board. We may not bring them all into the CMS. We’d be looking for best practice and strategy there. We have a number of web apps and we need a strategy to deal with those whenever we go live with key parts of our website. A list is included in the RFP – 3rd party applications, MavPark, MavScholorshop, catalog, Mentis, Admissions Chat, Ask Admissions. How will we deal with this in the short term? How will our users still be able to connect to these features if we’re not doing a lot of integration. Question regarding Persona – is UTA creating the personas or is the Implementation partner going to help? Jeff Neyland – we have 5 journey maps The Implementation partner should review the data that we provide and give us feedback on those personas. Put in your response how you can help us refine the persona Vendor Question – did you have research help or were those made on assumptions from a steering committee Answer - Based on assumptions at this point. Personas: perspective student, enrolled student – current student, parents of students, International students – 5th most diverse University in the nation, alumni
Each of those personas has sub-personas – perspective student: could be dual credit students or undergraduate, transfer, high schooler, community college, 8th grader, graduate candidate, etc… We’ll be doing one of our journey maps on one of these sub-personas and we’ll provide that to the IP.

Recommend a support team structure. What we do now, we may need to rethink how we address it in the future. We don’t have a good support structure at this point in time. We don’t want to repeat this mistake. We want to help the campus to use the product to the best of our ability. We may need resources that aren’t solely focused on design & development.

Early in the project so we can begin recruitment activities so we have some of these resources in place.

Vendor question: How much exposure have you had to the marketing capabilities of the Sitecore platform?
Answer: Daniel: only what we’ve seen in the demo so far.

Implementation Partner should input a suggested duration for each section. In addition to the UTA timeframe.

Daniel: IP should review our current website and let us know if functionality is missing to serve the personas we have identified and review the usability to help people find information.

Persona journey map – looking to ID their pinpoints, complete a life cycle.

Users are looking for key information. Info architecture: how are webpages are laid out, how they’re structured and if there’s a better way to organize that. Visualize how they flow throughout the site.

We want to integrate social channels with the site – integrating Facebook feeds and Twitter feeds. We want to look at how we put that on the site, that users interact with. And we want wireframes – 8 iterations of that. Discussion on this happening in preferred timeframe. Vendors should provide alternatives if this isn’t feasible.

Vendor question – photos – are you working with a brand agency?
Sana: We will contract that out – we will create a shot sheet to create a photo bank to use.

Vendor question: As far as videos – do you have a plan for video hosting?
Sana: We have our own servers and we will use Youtube but we are open to other options.

UI kit – need better consistency across campus. Includes button styles, secondary color palette, topography, headline styles, etc…

General design research – market trends, design review, look and feel analysis is tied in. Is it modern?, is it clean? We want to have a conversation about that. What is the Implementation partner’s vision for the site.

Mockups using Sitecore:
Erin: Desktop mobile and tablet; jggs.

Identify key landing pages – UTA homepage, Admissions landing page, Apply Now page, academics landing pages. Look at UNLV and Oregon. We have a lot of international visitors and being able to toggle the language and how that plays into the site; how a user can find it and use it.
Colleges & Schools or Majors & Programs. What is the right name? – maybe do an A/B test and put both links out there to see which is best with our audiences. We don’t have a page with majors so it would be disingenuous to send users to a page that says majors but sends them to a page that doesn’t include majors. We want to use language that resonates with the target audience. We want to make sense to our student body.

Sana: 8 iterations that we want these done within 6 months. We will consider some time lag (a week or two), but not much. 8 iterations is deliberate. We need to see landing pages; we need to see 3 – 5 variations of internal pages. Then we know what we’re developing for content. Lay out the functionality of internal pages must be completed within a very tight timeline. We need to be able to work on content while developing is still working on the site design.

Vendor question – what does the process approval look like on UTA’s end?
Sana response: We have to have a direct line of communication. Can’t have 3 or 4 levels of approval. For University Communications Daniel will have the final say. Sana will work closely with him. The Mock Ups is where the President is involved. The WireFrames are on the university. We want users to get into the system and input content. We don’t want content to go stale. The current system is too cumbersome. Or, departments are spinning off and doing their own webpages. We want easy access and that’s going to be priority for us from an architecture standpoint on the back end. The user interface will have to get green lights from the Presidents’ office but since this is their directive, we will be able to get that done. We have developed a core team that will be involved in signing off on things.

Erin: Everyone on campus is highly motivated to make sure we do everything we need to do on our end. This is the highest priority for us right now.

Vendor Question - What resources will be supplied by UTA? Development, QA, UAT, content mgmt., technical architecture, etc..
Answer: Daniel - as far as University Communications – we will be involved in day to day discussions in vetting ideas and also QA.

Jeff: We will have specific roles identified for project management, business analysis function, the infrastructure comes from us. That doesn’t mean those same kind of roles don’t come from the vendor because they’ll have their own need for those kinds of skill sets. We’d love for the vendor to help us identify and missing roles as we kick this project off.

Sana: The content piece will fall on UTA from photos to content page by page and how we will populate that. The mockups will outline the user experience and what the art could look like. We’d like some guidance from the vendor kind of what that would look like. Internally we’ve talked about how to clean up the content. We don’t want users to have to scroll through pages and pages and have to click through content and losing where they started.

We will clean up the content, make it look nice, etc.
Internally we have already had content discussions, discussion audits, remove dead links, cleanup, etc… so the content migration will be quicker.

Vendor Question - How structured is your content now because Sitecore is much more modular than most other systems? It might not be as simple as copy/paste.
Our content is tens of thousands of pages. We are doing a lot more lifting instead of developing and recreating. We don’t want to reinvent the wheel with our content migration during the process. We understand that some pieces will have to be restructured but the bulk of it is being filtered.
Daniel: The unique landing pages are in a priority order – starting with the homepage.

Templates:
3-5 internal pages; variations under the landing pages.
Any questions about the templates?
Jason Hardy – we’re talking about migrating specific pages in a 6 month window but there is additional content that would remain on the server? Or are we looking to move everything in 6 months? Are we looking for recommendations on how to access that data? Redirect traffic through Sitecore; to Sitecore? Do you have a pre-determined cut-over date?
Univ. Com: We are working on a list of websites and applications.
Erin: We have quite a bit of content on our content management system and some that resides on a web cluster outside of the content management system. Are we looking to move all of it in 6 months? We don’t have an answer to that yet. Web governance needs to create policy about where does content live. We have multiple options on that right now and we have to look at what is our strategy. Jeff: We are looking for best practice guidance.
Erin/Jeff: Big bang or phase – we don’t know yet. Our expectation is not big bang – gradual phase in.
How do we deal with DNS(???) – to reach some of the content on Sitecore vs manage redirects to things that might not be moved immediately. Concern is that we have concern on www.uta.edu that wouldn’t migrate to Sitecore and I can’t see a good solution other than changing www to something else. We would need to redirect from one to the other – also addresses people that have bookmarked pages. We need the content to remain accessible – do we have a strategy?
(Don’t know origin of question – vendor or UTA) Are Wikis, Blogs and Sharepoint are out of scope? Yes

Tools:
Erin: Fairly critical tools for student recruitment. For example “Events calendar” - we have 3 different calendars, we’d like to know how Sitecore might deal with calendar functionality. We have directory functionality. How do we deal with that? Maps is another function.

Forms:
Connecting to the emergency notification system. If we have an emergency, we use our webpage to communicate. We are connecting to RAVE. We need to make sure that emergency messages can be displayed on the homepage.
Do you have defined APIs? Yes, for emergency communication and some calendar. Other functions may not have defined APIs.
We use NetIQ – it has an API – we can use that for directory functionality.
Need to be able to run site search and that we’d have form functionality – request information, giving form.
The giving form is modules.
Vendor question: Site search – how do you currently use?
Univ. Comm: We use Google Custom Search Engine for site search.
Vendor question: Are you planning to stick with that?
Univ. Comm: We are open to alternatives.
Erin: We use BING for site search for China users
There are several forms and other sites that may require authentication – pooling directory information from the campus. We support active directory and this can also support Azure active directory.
Vendor question: Architecture: Are you planning to operate Sitecore in Azure?
Erin: No Sitecore is hosted in Azure.

Testing/Validation:
Daniel: We would ask for vendor recommendation. Testing should include multiple operating systems and web browsers – talking about QA.
Vendor question: Do you have designated requirements for browsers?
Univ. Comm.: A-grade browsers: more than normal usage of older versions of IE, and A-grade.
Question from Deepika: Tool administration – training/transition internal support. That is covered in the scope of the document.

Development/Technical considerations:
Vendor Question - Do you have a SEO vendor?
Univ. Comm: No, not currently.
Vendor: Do you have requirements for accessibility?
Univ. Comm: Must follow state accessibility guidelines and UTSystem guidelines. Spelled out earlier in RFP.
Continued through listing items from the RFP document.
Vendor question - Mobile friendly, IU, have you made decisions regarding what kind of devices?
Univ. Comm: We want to hit all possible devices: iPhone, desktop, laptops and tablet.

Sitecore & Infrastructure:
Erin: We will need assistance with Sitecore configuration. Your proposal should help us understand what the configuration and implementation of the software platform will look like. Initial configuration should be secure.
We want to make sure that authentication is tied into Sitecore use. We mentioned access to audit and web logs, error logs, Splunk, etc (as listed in the RFP).
Vendor Question - Is there a single sign on solution that we need to integrate with?
Erin: Yes, we have a few that we use and we need to decide which one to use. It will probably be ADFS and Azure.
Question: Monitoring – reporting on Up/Down for health of the service.
Univ. Comm: We have services right now that help with that – Site Improve is one product that we use to monitor health of websites.
This will depend if it is hosted or on-premise. Not part of this implementation.

Question from ??? - Workflows – do we have a sample workflow yet?
Erin: There is some activity that we are trying to get done between now and when the vendor should be selected. We expect to be able to complete governance and policy decisions. We will have some workflow in place on some pages on first level and second level so we’d like some assistance on developing workflows that make sense. Best Practices around implementation – we need the vendor to give us some framework around that and the migration.

Question on security from Bobby Edamala: Is the expectation from the vendor to integrate security testing as well or does that fall on OIT’s operational personnel to perform? Are we looking for the Implementation Partner to provide security testing as part of testing/validation?
This has not yet been determined. We will check it internally but it would be good if the vendor would test it as well.
Security testing needs to be done on templates, photo banks, etc…prior to being approved for use on campus.

Migration:
Refer to list in the document.
Vendor Question – Timeline: 6 months; 3 months have both been mentioned. What is our anticipated start date is? Ideal go live date?
Sana answer: 6 months is the goal (3 months came from the President). In 3 months we would like to be able to show progress. January roll out especially with high profile landing pages. If there needs to be a phase to for some of the internal pages we’re okay with that. We’ll make sure we have that outlined on what absolutely must roll out in January and what we can give another 3-6 months in 2018.
This is the most time consuming part for an organization as large as UTA. Maybe we can cut down on the number of pages and we are having those discussions internally.
We would like to start migrating content in November; before Thanksgiving would be great. We will lose 2 weeks in December due to holidays/campus shut down. We estimate that we have 40,000 pages. Google says 50k but we aren’t exactly sure.

MIGRATING WEB FORMS, WEB APPLICATIONS:
We have various web form creation packages. Goal will be to migrate as many as are in the scope into the new system.
Migrating CMS permissions - user groups, profiles
Quality assurance and testing – touched on earlier in the document

Analytics:
Continue and expand use of analytics. Currently use Google in some pages but not installed on all pages. We want to be more consistent. Look to the vendor to configure and set that up. Set goals and tracking strategy for how to use the analytics.

Training:
…for content managers
Pretty straight forward.
Sana: Build in a couple days of training.
Vendor question - How many content managers do you have?
Answer from ???: We have about 1000 users but many are not currently active. We try to empower the departments to manage their own content. We may have a train the trainer scenario.
Erin: We need to figure out ongoing support.
Question from ???: Will Univ. Comm. be the point for ongoing support after the training?
Might be part of the SOW – support strategy.
Vendor question: So, regarding training, there’s base understanding of Sitecore; then solution specific training: are we looking for vendor to do both or are we planning to send some users to official Sitecore training and have the vendors do solution specific training?
Sana: About 100 people for the core training, probably tape it, will be directed towards OIT. Extensive and related to the vendor. Video training for rest of campus; training will be handled by UTA personnel.
Erin: Any recommendation on what is the amount of training to have after the vendor leaves to have us be successful; that would be reasonable in this proposal.
Vendor Question: Does UTA expect training documentation/customized documents to be provided by the vendor? Yes – but something very simple; preferably front and back one page. Something that users can have on their desks and refer to and if something’s not on there they can talk to OIT or Univ. Comm. who will have a direct pipeline to the vendor.
Lee: I think we need the vendor to let us know how much training is needed and how much content is needed for training of our employees.
Sana: The end-user training should be very simple – seeing only their templates/sections/banks.
Assumptions:
Erin: UTA resources – a liaison will be appointed
Staff will be available to assist – this is the highest priority project with our folks.
We recognize that if our staff is not available, that impacts the timeline, a change order may be necessary.
We will review/respond documents within 5 days.
UTA will schedule our resources for the project activities.
Vendor will have access to space, phones, printing, internet, etc. Majority of work will be done remotely.
As soon as we complete the procurement, we expect to begin right away.

Vendor question: Procurement timeline:
Nancy: RFP is due 8/14
HSP review 2 days
Evaluation team: Complete by 8/31. Establish competitive range/short list of proposers for interviews to take place the week of Labor Day (first week of Sept).
BAFO (if necessary) due end of Sept.
Quick turn around who we would award to, work through any legal requirements.
Contract in place by mid-October.
Your legal department should look through the RFP. If there are any Terms and Conditions that you object to, you need to mention that in your proposal.

Vendor Question: Appendix 5 and 6. DIR & Security Characteristics. Are these to be submitted by 8/14?
Nancy: No, that will be requested from the successful Proposer.

Vendor Question: For the other Appendices – what is due 8/14?
Nancy: HSP is required by 8/14.

Bonds will not be submitted with proposal but upon award. Same is true for COI and CBC.

Deadline for questions by Monday at 3pm.
If you are on the phone, send me your contact information.
We will send out the Q&A from today within a couple of days. Will not be sending out Zoom audio file.

Vendor question: When will the 7/24 questions be answered?
Nancy: Answers will be issued by 7/31

Vendor question: Pricing? It suggests a milestone based payment model. Are you looking for a fixed fee or Time and Material?
Nancy: Fixed price for project.

Two methods – our proposed timeline which could require additional resources on vendor part or the vendor’s proposed timeline to deliver quality product.

Vendor question: Will Time and Materials proposals be automatically disqualified?
Nancy: I wouldn’t say automatically disqualified but it will be very hard to compare apple to oranges. It would make evaluations more difficult. We prefer everyone to be on the same playing field.

Erin: Sections on Role & Responsibilities:
Give UTA a good idea of the resources that we need to have on hand. Let UTA know what resources the vendor will be bringing to bear on the project.