

REQUEST FOR INFORMATION

PROPOSAL NUMBER: Y16RFIMTS0001

ISSUE DATE: JULY 10, 2015

TITLE: Redesign of www.unc.edu

ISSUING AGENCY: UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL
PROCUREMENT SERVICES
104 AIRPORT DRIVE, SUITE 2700, CB #1100
CHAPEL HILL, NORTH CAROLINA 27599-1100
ATTENTION: Mr. Mark Sillman
Phone: 919.962.9463 Fax: 919.962.0636

USING AGENCY: (DEPARTMENT NAME)

IMPORTANT: This is a Request for Information only and is not to be construed as a Request for Proposal. No cost and pricing data are requested nor should it be included with your response. Responses should be submitted in a sealed envelope indicating the firm name and RFI number on the front of the envelope or package. Additionally, potential vendors may provide a digital space online or via portable drive that links or shows sites and creative digital work by the agency.

Sealed responses will be received until **3:00 p.m. on JULY 30, 2015** for furnishing information on the services described herein at the address indicated above as Issuing Agency. Proposals not received by **3:00 p.m. on JULY 30, 2015** may not be considered. No details of responses will be divulged at the time of opening. Please submit six copies of your written response no later than **3:00 p.m. on JULY 30, 2015**.

All questions concerning this RFI must be submitted via email as a Microsoft word document to mark_sillman@unc.edu, no later than **4:00 p.m. on JULY 17, 2015**. Please ensure that the subject line of your email says something like “**Questions for RFP Y16RFIMTS0001**” so that your questions will be properly identified and not discarded as possible spam. A summary of all questions and answers will be posted on the Internet or emailed as an addendum, located under the RFI number being modified.

It is the offerors responsibility to assure that all addenda, if any have been reviewed, signed and returned.

Pursuant to G.S. 143-48 and Executive Order No. 150, the state invites and encourages participation in this process by businesses owned by minorities, women and the disabled.

PURPOSE:

This Request for Information is being issued to obtain a contract with a service provider to redesign the homepage for the University of North Carolina at Chapel Hill (www.unc.edu) with a wide range of related deliverables and options for content delivery as outlined below. The work will also include site architecture and content strategy for three sites: office of the Chancellor, office of the Provost and Board of Trustees that have their own staff to maintain their sites in a way that complements unc.edu and the staff that maintains it. Work will begin with days of vendor selection and notification.

This project will design a unc.edu and deliverables listed below so that the site makes information easy to find and entices visitors to consume engaging content and to learn more about the University, its work and its people. Such a user-centered site must be based on research on what meets the needs of primary audiences. The site will visually align with Carolina's messages and its reputation as a world-class research institution that provides a quality education and serves the public good. The site will continue to be maintained in WordPress (4.x with multisite enabled), and the University is open to the use of proven, secure plug-ins for presenting content and functionality.

The chosen vendor's work must be finished with reasonable time so that work by the University will ensure that the site is live and cut over from old site is complete no later than March 18, 2016.

BACKGROUND INFORMATION:

Carolina is the nation's first public university. It was chartered in 1789 as the first state university in the United States. Today, UNC-Chapel Hill is a public four-year research institution and among the leading research universities. It regularly ranks as the best academic value in U.S. public higher education. It enrolls around 29,000 students, and has 3,700 faculty and 8,300 staff.

The site is maintained in WordPress by Communications and Public Affairs and hosted on campus by UNC's Information Technology Services (ITS), which also supports WordPress. The site consists of approximately fifty pages, with hundreds more generated from templates for directory pages, news items, carousels, campus tour landmarks, etc. Each month, the site (sitemap provided to show current page types) gets approximately 300,000 unique visitors and 1.6 million page views.

The site's last major redesign was more than five years ago. The past year has seen a ten-fold increase in content and the staff that creates the content. The budget for website development has been minimal as that work has been done in house. There is no budget set for the work outlined in this RFI.

UNIVERSITY PROVIDED MATERIALS:

Files for branding elements and graphic identity guidelines are at <http://identity.unc.edu/>.

DUTIES AND RESPONSIBILITIES OF THE UNIVERSITY:

UNC Communications and Public Affairs (COMPASS) will appoint a primary contact, UNC ITS and UNC Creative (the design group in Communications and Public Affairs) will each appoint a representative for technical issues and design consideration. The two offices will be responsible for implementation and launch after the contracted work with the chosen vendor is finished. COMPASS and ITS will be responsible for migrating existing content and producing content for the launch version. The chosen vendor will not be responsible for a full WordPress build-out of launch version.

A steering committee will also be a part of the process.

The representative and their colleagues will provide access to key stakeholders on campus and make arrangements for meetings, discussions, testing, interviews, etc.

SCOPE OF WORK AND KEY DELIVERABLES:

Vendors may submit proposals for both Option A and B or for only one of the options. submit proposals on two options.

Option A: vendor completes discovery/research, testing and verification, creating designs and doing development work/coding necessary to handoff of PSDs (with realities of implementation in mind) to UNC ITS. In Option A, the chosen vendor will provide

- no fewer than three mock-ups of homepage designs with mock-ups for
- complementary designs for second-level pages that may serve as landing pages that present multimedia, feeds from third-party integration points such as maps, UNC's events calendar, a social media and other channels and,
- third-level designs for use by campus schools, departments and centers,
- HTML, CSS and Javascript files after discussion of roles and work to avoid any major overhaul by ITS
- Back-end development on WordPress in collaboration with ITS
- examples of customized design elements for use by campus units that cannot adopt the enterprise designs offered through UNC's WordPress instance,
- skins for use with UNC's social media accounts and variations for potential use by followers who want to give a UNC theme to their accounts
- designs for use in digital advertising, digital publishing such as Adobe, including mobile phone variations, apps, display ads, pop-ups, video and scoreboards,

designs for traditional advertising, including newsprint, magazine, billboards, etc.

UNC is open to a project plan in which vendor developers start working with UNC earlier in the process, alongside the vendor's UX architect, designer and developer, to prototype content types in WordPress and apply design styles and theme elements as the vendor is developing designs and templates? As opposed to having us do all of our work and then pass it to ITS.

Option B: vendor completes all work in Option A except design creation, which would be handled by UNC Creative.

Deliverables are listed below. Potential vendors are free to research and present anything unique they recommend. Go beyond peer institutions and others such as University of Virginia, scad.edu, bucknell.edu, unl.edu, UC-Berkeley, University of Michigan, Duke University, Penn, UCLA, University of Texas, University of Washington at St. Louis, University of Minnesota, and others with recent redesigns and ongoing efforts in place such as Cornell, Dartmouth and Kenyon. Consider examples from the entertainment industry, corporations, media, and throughout the Web. Of course, there is a need to listen to stakeholders such as UNC's chancellor and senior administrators, undergraduate and graduate admissions, research, government relations, faculty, staff and students.

We can use what analytics tell us. For instance, we know Google analytics that the most popular pages are news items, featured stories, the search page, and landing pages for academics, prospective students and athletics. This data can guide the decision-making process. Additionally, it is our hope that the new unc.edu will be dynamic and adaptable, allowing us to make data-driven design decisions to better serve our diverse audiences. Data could include user behaviors, traffic analysis, devices, etc.

UNC can share with the chosen vendor any analytics reports developed after vendor signs any nondisclosure document supplied by UNC Purchasing.

While landing pages such as About, Research, Global and other existing primary navigation may well need to be a part of a design, the chosen vendor's discovery, research and recommendations may indicate a new direction for these subdomains and others as the ones mentioned above for the Chancellor, Provost and Board of Trustees that combines intuitive navigation with function that promote exciting content.

UNC has not conducted extensive research recently, but will provide what information it can to the chosen vendor.

For the central work on the website, designs will be based on qualitative and quantitative research by the chosen vendor and an agreed-upon methodology that should include:

- stakeholder and landscape research,
- identification of and measurement of at least the top three user needs and top three client needs, with an attempt to capture data that may inform any need UNC has to engage audiences digitally,
- surveys,
- sitemap, usability testing at different phases such as IA creation and wireframing in collaboration and with assistance from UNC staff. Vendors are welcome to suggest a testing schedule and methodology. UNC has some resources on campus to help with tests such as A/B, bucket, wireframe, retrieval, etc. UNC will also help in recruiting subjects and scheduling if done on campus.
- stakeholder input on any preliminary design concepts,

- and may include vendor's suggestions for functionality that will enhance the user experience, whether it be content delivery, search, architecture or any other site function.

Content migration (pages, documents, images, features, functionality) from sub-sites such as schools, departments and divisions are not included in the project, though a set of web templates that these units will use is included.

Depending on what is being approved, most work will be seen by a team. The goal is the most approvals will be of the 2-3 day variety, but reviews that include several people, busy schedules and teams that benefit from face-to-face discussion may take at least a week. UNC will expedite when possible. Please account for University/State holidays, spring break, a reduction of students and faculty in the summer, and particularly busy times such as exams and spring Commencement that dominate calendars of our administration, faculty and students.

For purposes of mockups, vendors may use stock, their own photos or images from <http://urxserve.ur.unc.edu/res/sites/Luminosity/> and UNC's social media channels or video from any source, keeping in mind UNC's YouTube channel as a source. For launch version, UNC's own content should be used.

The official fonts for the University are Bembo Std and ITC Franklin Gothic. Bembo isn't a web font, and although Franklin Gothic is, UNC encourages vendors to choose fonts that are more legible online and contemporary in style. Each agency will need its own font subscription/license. That isn't something that UNC can share.

If an option is selected that requires the selected party to develop some or all of the site, UNC will provide a development environment on request.

There is not a list of plugins that are required to be supported. Here is a list of some potentially relevant plugins that are installed/supported on the multisite network. Vendors should not limit their thinking or response to these and should feel free to introduce new functionalities.

Access - by OnTheGoSystems

Admin Columns Pro

Adminimize

Advanced Custom Fields

Advanced Custom Fields: Options Page

Advanced Custom Fields: Repeater Field

Akismet

CMS Tree Page View

Collapse-O-Matic

Easy Bootstrap Shortcode

Edit Flow

Enable Media Replace

Exclude Pages from Navigation

Gravity Forms
 Gravity Forms + Custom Post Types
 JSON REST API (at least until it gets included into core)
 Page Links To
 Press Permit and all associated add ons
 Redirection
 Revolution Slider
 Table of Contents Plus
 TablePress
 The Events Calendar
 The Events Calendar Pro
 TinyMCE Advanced
 WP Types & WP Views

ITS completes analysis and approval for plug-ins as needed when certain features and functionalities are requested by campus users. For this project, we request conversations as early as possible regarding plug-ins that will need to be added to UNC's environment. Each new plug-in requires discussion of performance and security issues. If a plug-in is not suitable or safe for our environment we want to provide ample time to find a replacement. We do not believe custom plug-ins will be required unless the design requires functionality for which no suitable plug-in exists.

Other deliverables include:

1. Proposed process and timeline, with phases outlined.
2. Evaluation of the current site's search engine optimization, rankings and keyword analysis. Phase two of the vendor's SEO work will include testing the new coded site to minimize any decrease in SEO through a replica, tombstoning or industry standard method that yields a report. The report should indicate the level of improvement in SEO rankings before and after the redesign.
3. A design that:
 - enables users to have customized content not only show on their browser and recognize their preferences when they return, but also allows for feeds of customized content and notifications of content updates through the user's social media accounts, email subscriptions, etc. Vendor will look for the latest ways to provide a customized experience for audiences until the last possible feasible moment such ways can be approved and implemented. Sensitive data is not published on unc.edu, and UNC is prohibited from collecting user information. In that sense, we are prohibited from using technologies that collect that information.
 - showcases and seamlessly integrates Carolina's expanding amount of daily multimedia content, particularly video, and infographics,

- provides ways for users to subscribe to or receive content updates such as selecting to receive an email newsletter or notification via social media when new content is published; this function must be compatible to ITS's ability to support,
- showcases user generated content in interesting ways and makes use of feeds from social media,
- has options for presenting user-generated content curated by UNC staff that illustrates UNC's messaging,
- presents a bold, innovative design that adheres to UX best practices as well as emerging trends that make sense for UNC audiences while possibly surpassing techniques such as horizontal scrolling or parallax variations in providing an easy-to-use but "wow" experience ,
- considers our multigenerational constituent base when making UX decisions,
- maintains the established Carolina brand standard/logo,
- makes the strongest, most meaningful visual impression,
- gives the University's administration a platform for sharing its vision,
- supports the University's next capital campaign with a space or features that not only attracts users to campaign information but also gives the content team a place to highlight initiatives after the campaign ends,
- provides templates that will enable adoption of design elements and themes by marquee sites such as the Office of the Chancellor, Office of the Provost, Board of Trustees and those of schools, departments and other campus units,
- shows consistency in design elements,
- is compatible with the leading browsers and at least the past three versions of each, which include IE 11, 10 and 9 and latest versions of Chrome, Firefox and Safari. The expectation is that even with minor issues that IE 7 and 9 will support primary functions. Mobile and tablet browsers should work, as well.
- features intuitive, efficient navigation for which vendor has considered more modern, possibly edgier navigation widgets that make sense for UNC's audiences (such as sticky nav elements) , and a site structure verified through usability testing,
- produces responsive behavior through as many break points necessary to deliver a great user experience across different devices. Some designs might work great with the standard three – desktop, vertical tablet and smartphone – but some may be better with six, considering different sizes of phones, tablets, etc.
- is accessible to disabled users in compliance with Federal Law and W3C standards at the WCAG 2.0 A level, with contrast for users with limited vision and navigation for those who use keys instead of a mouse. Testing against W3C criteria must be done with recommended W3C tools, in addition to any tools the vendor recommends,
- is compatible with current unc.edu functionality that required extensive coding/development such as the aggregated social media piece, search, feeds, UNC's mapping display interface (<http://unc.edu/maps/>), UNC's events calendar in WordPress (<http://events.unc.edu/> uses Events Calendar Pro plug-in by Modern Tribe with a custom theme for front-end views) and the display of featured events on unc.edu. The new maps page would pull from the same real-time database and

render all of the entities currently shown – buildings, green space, water, etc. Plus, it will zoom in on buildings found through the search function.

4. Recommendations on content and /or message prioritization would be an expected deliverable of this project? UNC assumes that vendor designs will illustrate the agency's thinking and findings. We think that we have message prioritization fairly solid, but that can certainly change as issues arise.
5. Coding of design. Vendor codes design and delivers code to ITS in agreed upon manner.
6. At least three presentations to the steering committee, with any pre-meetings with project sponsor and main liaisons set prior to steering committee meetings.
7. Creation of materials for presentation by your staff and UNC personnel to stakeholder groups such as the University's Board of Trustees, top-level administrators, the campus webmaster group, town halls, etc., with goal of perfecting the design while helping stakeholders understand and adopt the design.
8. Counsel to UNC on a launch communications plan using all channels, pre-launch media "tours" of the site, stakeholder acclimatization, and personal contacts. UNC has had successful plans in the past, but is open to new things such as innovative use of social media. Vendor may be asked to collaborate on and review launch stories, perhaps in areas such as feature descriptions and rationale.
9. After award of the contract, the chosen vendor will present a phased timeline, complete with pricing and details for each phase. Adjustments to the timeline and details may be made in agreement by all parties. In particular, the vendor will detail an implementation phase but confer with UNC's representatives as testing and any changes dictate changes in technical steps or other phases that may alter implementation.
10. As it pertains to new functions, any presentations and possibly for the launch version, vendor will work with UNC to create content types/categories. UNC will use its resources as much as possible to produce launch content, as that will help staff learn what is needed to provide content types.

PLATFORM:

The site is a WordPress Multisite. Any site development should be configured for multisite. The technical infrastructure is:

- * F5 Load Balancer (SSL Off-load)
- * Varnish server caching
- * Four web servers (Apache/Linux)
- * PHP
- * MySQL Database

SITEMAP:

A sitemap is available here: https://www.unc.edu/sitemap_index.xml

- [Livestreams](#)
- [Academics\(7\)](#)
 - [Academic Departments](#)
 - [Continuing Education](#)
 - [Departments by Interest](#)
 - [Distance Education\(1\)](#)
 - [Student Complaints about Delivery of Distance Education](#)
 - [Online Education](#)
 - [Provost](#)
 - [Services and Resources](#)
- [Public Service](#)
- [A-Z](#)
- [About UNC\(11\)](#)
 - [Accessibility](#)
 - [Contact Us](#)
 - [Events Calendar Submission Guidelines](#)
 - [FAQs\(1\)](#)
 - [Questions/Feedback](#)
 - [History and Traditions\(8\)](#)
 - [History](#)
 - [Logo and Licensing](#)
 - [Landmarks](#)
 - [School Mascot](#)
 - [Southern Roots](#)
 - [University Colors](#)
 - [University Day](#)
 - [What's a Tar Heel?](#)
 - [Mission](#)
 - [RSS Feeds at UNC](#)
 - [TESTING123](#)
 - [Privacy Policy](#)
- [Alumni](#)
- [Arts](#)
- [Athletics](#)
- [Current Students\(3\)](#)
 - [Today & Tomorrow](#)
 - [New Students](#)
 - [Graduating Students](#)
- [Departments](#)
- [Discover UNC](#)

- Faculty and Staff(1)
 - Today & Tomorrow
- Health Care
- Maps
- Page Not Found
- Parents(1)
 - Getting Started
- Prospective Students
- Search UNC.edu(2)
 - Advanced Search
 - Search Results
- Suggest a Social Media Account
- Visitors(5)
 - Getting Here
 - Helpful Contacts
 - Top Destinations
 - Priceless Gem Tours
 - Schedule a Tour(3)
 - Other Tour Groups
 - Prospective Graduate Students
 - School Group Tour Reservation
- Stay Connected at UNC

AGENCIES:

- UNC will not know how many agencies will submit responses to this RFI until after the submission deadline.
- The agency that provided the last redesign work and others that submitted RFI responses last time are free to submit a response, and this should not dissuade other agencies from responding with their ideas.

REQUIRED AGENCY QUALIFICATIONS:

- Three examples of redesigns and documents outlining each process, with the inclusion of at least one .edu redesign if vendor has completed one in the past year. As this work will be on a WordPress site, any examples of development for WordPress will be critical.
- Three references with names and roles of contacts listed.
- Team bios, including each person's responsibilities and expertise.

DESIRED AGENCY QUALIFICATIONS:

- Knowledge of the opportunities and challenges associated with a collaborative creative process in the higher education environment.
- Familiarity with UNC-Chapel Hill.

CONDITIONS FOR REQUESTS FOR INFORMATION (RFI)

RESPONSES

All responses are subject to the conditions outlined herein. All responses shall be controlled by such conditions and the submission of other terms and conditions and other documents as part of an offerors response shall be waived and have no effect on this Request for Information.

REQUIRED RESPONSE CONTENT

Qualified firms are encouraged to submit a response for performing the services described herein. All responses shall be submitted in accordance with the requirements of this Request for Information. Failure to include any required information in the response may be grounds to disqualify a firm from being able to proceed. Responses shall be prepared simply and succinctly providing a straightforward, concise description of the offerors abilities to satisfy the requirements of this Request for Information. Emphasis shall be on completeness and clarity of content. The information shall be prepared, tabbed and submitted in a clear and logical order.

RESPONSE SUBMISSION AND OPENING

The response must be received by the Issuing Agency no later than the date and time specified on the cover of this Request for Information. Each response shall be placed in a sealed envelope with the following information printed on the outside of the envelope; complete name of the offerors company/firm, the Request for Information number. Ensure that you have the Request for Information number printed on your address label so that it can be properly identified upon arrival at the Issuing Agency address.

EVALUATION OF RESPONSES

The offerors response shall be submitted at the time specified. Designated University staff members shall evaluate the responses received and will consider the following factors in recommending if a presentation is warranted. These factors are not necessarily listed in order of priority.

- A. Overall experience and qualifications of the offeror and proposed personnel
- B. Experience and/or credentials in providing the professional services required
- C. Performance of the offeror as evaluated by the references supplied

Offerors are cautioned that this is a Request for Information, not a request to contract, and the University reserves the unqualified right to reject offers for any reason when such rejection is deemed to be in the best interest of the University.

ELABORATE RESPONSES

Elaborate responses in the form of brochures or other presentations beyond that necessary to present a complete and effective response are not desired.

In an effort to support the sustainability efforts of the University we solicit your cooperation in this endeavor.

It is desirable that all responses meet the following requirements:

- All copies are printed double sided.
- All submittals and copies are printed on recycled paper with a minimum post-consumer content of 30% and indicate this information accordingly on the response.
- Unless absolutely necessary, all submittals and copies should minimize or eliminate use of non-recyclable or non-reusable materials such as plastic report covers, plastic dividers, vinyl sleeves and GBC binding. Three ringed binders, glued materials, paper clips and staples are acceptable.
- Materials should be submitted in a format which allows for easy removal and recycling of paper material.

ORAL EXPLANATIONS

The University at its option may request oral presentations, or discussions with any or all offerors for the purpose of clarification or to amplify the material presented in any part of the response. However, offerors are cautioned that the University is not required to request clarification; therefore, all responses should be complete and concise. The University shall not be bound by oral explanations or instructions given at any time during the process.

REFERENCE TO OTHER DATA

Only information which is received in response to this Request for Information shall be evaluated; references to information previously submitted shall not be evaluated.

RIGHT TO SUBMITTED MATERIALS

All responses, inquiries, or correspondence relating to or in reference to this Request for Information, and all other reports, charts, displays, schedules, exhibits, and other documentation submitted by the offerors shall become the property of the University when received.

COST OF RESPONSE PREPARATION

Any costs incurred by the offeror in preparing or submitting responses are the offerors sole responsibility; the University shall not reimburse any offeror for any costs incurred to include costs associated with presentations if asked for.

CONFIDENTIAL INFORMATION

To promote maximum participation and to protect the Request for Information process from being used to obtain information that would normally not be available otherwise, the University shall maintain the confidentiality of certain types of information. All such information intended to be kept confidential must be designated in writing

“Confidential.” The obligations of non-disclosure shall not apply to the following:

- A. Information which, at the time of disclosure is in the public knowledge;
- B. Information which, after disclosure becomes part of the public knowledge by publication or otherwise, except by breach of this Agreement;
- C. Information which was in the possession of the University at the time of disclosure and which was not acquired, directly or indirectly by recipient from the disclosing party, and which prior possession can be proven by documentary evidence;
- D. Information received from third parties, provided such information was not obtained to their knowledge by said third parties, directly or indirectly, on a confidential basis;
- E. Information which is independently developed by the University’s personnel not privy to the Information.
- F. Information contained in any subsequent pricing schedules if and when asked for.

ADVERTISING

In submitting the response, the offeror agrees not to use the results there from as a part of any news release or commercial advertising without prior written approval of the University.

TITLES

Titles and headings in this Request for Information and any subsequent documents are for convenience only and shall have no binding force or effect.

EXECUTION OF PROPOSAL

TITLE: _____

PROPOSAL NUMBER: 65-RFI _____

FIRM
NAME: _____

ADDRESS: _____

CITY, STATE, ZIP
CODE: _____PHONE NUMBER: _____ FAX
NUMBER: _____FEDERAL TAX IDENTIFICATION
NUMBER: _____PRINCIPAL PLACE OF BUSINESS IF DIFFERENT FROM
ABOVE: _____

NAME: _____

TITLE: _____

SIGNATURE (IN INK): _____

DATE: _____

EMAIL
ADDRESS: _____
