Appendix C – Detailed Specifications and Requirements

# Functional Design

* 1. Reference material
     1. Mobile design comps, desktop and mobile Sketch files, and icons are available and will be provided to Vendors that submit an Intent to Bid form
     2. Download fonts for web use.
        1. Avenir Next <https://www.fonts.com/font/linotype/avenir-next> (Bold, Demibold, Regular)
        2. Adelle Semibold <https://www.fonts.com/font/typetogether/adelle/semibold>

# Features/Components

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Item#** | **Design/User Interface** |  | **Yes/No** | Comments |
|  | Implement responsive and accessible theme – or themes – that make usm.edu available to all users across platforms, devices, browsers, operating systems, etc. | R |  |  |
|  | Responsive, accessible tables and staff directory lists that can be created dynamically and/or without access to source code. Must be able to “sticky” or otherwise position certain profiles outside of automated alphabetical ordering, e.g., a department chair at the top. Design examples: <https://uchicagosites.uchicago.edu/directories/full/Staff-Directory> or <https://uchicagosites.uchicago.edu/directories/table/Faculty-Directory> or <http://owwwlab.com/faculty>. Faculty profile pages will be loaded via an interface to Digital Measures. | R |  |  |
|  | Responsive photo galleries that allows for both 4:3 and 3:4 images, and which provides a clean, orderly thumbnail view without poorly cropping (decapitating) vertical images. | R |  |  |
|  | Print-friendly CSS. | R |  |  |
|  | Export of CSS to provide consistent theme/template | R |  |  |
|  | **Content Authoring** |  |  |  |
|  | Copy/paste text cleanup from Word, email or HTML | R |  |  |
|  | Audit trail to determine last user to edit and/or delete a content area and date/time. | R |  |  |
|  | Automatic revision of a content area once editing begins so the most recent previously saved version is archived and can be selected if needed. | R |  |  |
|  | Improved UI/back end features for content authors, e.g., responsive back end to allow updates via mobile or tablet | O |  |  |
|  | Ability to manipulate field order for consistency (for example, a data field that is repeated in multiple content types should ideally be placed consistently in UI.) | R |  |  |
|  | Bulk actions via directory view rather than having to edit multiple content areas; the ability to move/reassign content from one group to another | O |  |  |
|  | Reliable content area “previews” in context | O |  |  |
|  | Search of “all content” within CMS admin interface  Search filter options should include ability to limit, or combine, search criteria on content type, title of content, groups, body and/or publish date, and sort search results should be sortable by a minimum of title and publish date | R |  |  |
|  | Help text on form fields within CMS admin interface | O |  |  |
|  | Preview feature across multiple device sizes to test content in responsive context. | R |  |  |
|  | Standardized, university-level content types for all sites, with the flexibility to add site-specific content types | R |  |  |
|  | Inline (body field) content area referencing for re-use of key content “chunks” in context, e.g., referencing from within a page to a tuition figure stored as a central content area or to a centralized link/contact content area that is easier to maintain. | R |  |  |
|  | Tools to create standardize new content types that can both minimize the need for file attachments such as Word, Excel and PDF; and reduce the need for non-standard content that users edit and style independently through WYSIWYG editors and/or source code access. Where WYSIWYG editors must be utilized, predefined styles must match CSS with no ability to overwrite via source code. Where file attachments are required, evaluate better digital asset management tools to integrate with CMS. | R |  |  |
|  | Scheduling for content to publish, unpublish; and “expire” in specific contexts, i.e., item rolls off the home page view/block but is not actually unpublished. | R |  |  |
|  | Option to mark individual content pages from being indexed into our search product, either temporarily while reviewing published content or permanently where content may conflict in search with other similar pages. | O |  |  |
|  | Option to syndicate content laterally or vertically across hierarchy of sites to re-use/share, package, recommend and subscribe to content, i.e., unified taxonomy, tags, other metadata and/or business rules. Re-use of key institutional data, such as academic degrees, for consistency and efficiency. | R |  |  |
|  | Image cropping/resizing within the CMS | R |  |  |
|  | **Functional** |  |  |  |
|  | Provide ability to personalize based on geo-targeting and self-identification. | O |  |  |
|  | Social media integration/support: display social content within the site, standing icons/links to social accounts, on-page embeds for liking/sharing (including pre-written “sharelines” on articles) and options for embedding individual tweets or Instagram posts within pages or articles. | R |  |  |
|  | Incorporate data from form submissions as a content type to be published, i.e., publishing as an event content type the information that was submitted through a registration form. | O |  |  |
|  | Improved user management, including the ability to identify through LDAP integration inactive users or users whose names/emails have changed; ability to message with users and provide ticket support through CMS or plugin; restriction of user emails to only official university email addresses. | O |  |  |
|  | CMS admin level option to use persistent URLs when page titles change. | R |  |  |
|  | One-to-one and wildcard redirects through the CMS admin interface." | R |  |  |
|  | Feature to clone sites/groups within centralized installation, allowing units that need to be reorganized to work with existing site content on the production server while the live site continues, until the unit is ready to transition to the new site. | R |  |  |
|  | Save-as option to duplicate an existing content area as a content template for creating a new, iterative content area. | R |  |  |
|  | Utilization of content area referencing where appropriate to connect and easily re-use/package content. | R |  |  |
|  | Optimization of images for web, dynamic scaling of images as needed. | R |  |  |
|  | Users should be able to select a containerized component to add to a page with specific features and requirements (i.e. slideshow, modal video, etc.) | R |  |  |
|  | Emergency notification features that allow customized messages to display, as needed, on the home page or other defined pages/sites; ability to easily switch the main site to a stripped-down version with minimal graphics and text updates in the case of a major emergency that triggers a traffic spike. | R |  |  |
|  | Custom, multi-step workflows and routing of content, tasks, and approvals. | R |  |  |
|  | Options to add commenting, notifications and status reports to workflows. | R |  |  |
|  | Integration with mobile data services to provide push notifications and similar functionality. | O |  |  |
|  | Ability to import/export content as RSS or JSON feeds and through API or other web services. | R |  |  |
|  | E-newsletter integration/distribution, with ability to send to authenticated users, anonymous users who have subscribed with an email address or existing email lists of users outside CMS. Incorporating A/B testing, dynamic content integration within email, analytics and reports on email opens and clicks. | O |  |  |
|  | Must support templating engine/language like TWIG or NHAML  \* back end developer should be able to expose system properties as variables  \* front end person should be able to consume those in templates  \* should support Tags, Functions. Filters, etc | R |  |  |
|  | Source/Version Control  All source must be managed through a Source/Version control system, e.g. Git | R |  |  |
|  | **Analytics** |  |  |  |
|  | Scoring behavior of users to define them as leads. | O |  |  |
|  | Tools to assist conversion rate, track how user activities influence on conversion rates and definition of high-level conversion goals | R |  |  |
|  | Improved analysis and understanding of user movement through site, where users drop off and tactics to reduce drop-off | R |  |  |
|  | Alignment of site architecture (organization of site URLs) to complement efficient use of Analytics. | R |  |  |
|  | Implementation of search tool Universal Analytics | R |  |  |
|  | Utilization of each tool analytics Tag Manager | R |  |  |
|  | Assessment/improvements in use of analytics tool for Campaigns, Goals and other metrics | O |  |  |
|  | Assessment/improvements in use of analytics tool Event Tracking to provide data at the macro and micro levels, including creating various pre-defined data sets (all clicks; clicks by grouping of pages or sections) and also utilizing on-page variables (title, tags) to be able to view and compare performances of individual pages. | O |  |  |
|  | Analytics tool access, management and recommended data sets for decentralized campus users/site owners to create an efficient process | R |  |  |
|  | Options for possible integration of main university Google Analytics account and a key sub-account with no loss of data | O |  |  |
|  | Standards for tracking clicks from mobile apps, push notifications or similar non-web platforms. | R |  |  |
|  | Web Testing Tools and Site Management Tools: |  |  |  |
|  | ·        Load and Performance Test Tools | R |  |  |
|  | ·        Page Speed Testing Tools | O |  |  |
|  | ·        Mobile Web/App Testing Tools | O |  |  |
|  | ·        Link Checkers | O |  |  |
|  | ·        HTML Validators within CMS | R |  |  |
|  | ·        Search Engine Optimization within CMS | O |  |  |
|  | ·        Web Accessibility Testing Tools | R |  |  |
|  | ·        Web Functional/Regression Test Tools | O |  |  |
|  | ·        Web Site Security Test Tools | O |  |  |
|  | ·        Cross-Browser Testing Tools/Services | O |  |  |
|  | · Cross-Device Testing Tools/Services | O |  |  |
|  | ·        External Site Monitoring Services | O |  |  |
|  | ·        Log Analysis Tools | R |  |  |
|  | Source/Version Control  All source must be managed through a Source/Version control system, e.g. Git  Ability to export all of our data/code/content to on-site backups  \* code should be pull-able through Source/Version Control System  \* database dumps should be available  \* uploaded files should be available | R |  |  |
|  | Security Functionality  \* IP blocking  \* 2FA  \* Password lockout policies  \* File scanning  - check for code changes  - check for changes in uploaded files  - check for changes in files filtered by file extension  - ignore images | R |  |  |

# Deliverables

* 1. MANDATORY: Project will yield a Technical design & site Implementation for usm.edu.
     1. Technical Design: The following constitute the technical design phase and shall be created following the site assessment including the review of all the information contained in the Appendices and functional documentation; Web Strategy, Content Strategy, Web Governance (provided at RFP award).
        1. Review & complete the Information Architecture document using Appendix D as a site map for usm.edu:
           1. Technical requirements, module availability/selection, gap analysis, decision on custom module development, if needed. Functional templates created: Homepage, Top Level Landing, College Level Landing, Academic Program/School Page, and Universal Page.
           2. Integration of other products, if applicable, - search, calendar, form builder
           3. Create a CMS recommendation & justification document to support the use of the suggested product.
     2. Phased Implementation of new and existing usm.edu site content:
        1. Deployment of a tested and functional usm.edu in phases, starting with the top level of usm.edu with new site content, and moving to a staged migration of existing/updated site content for the rest of usm.edu; including a responsive theme; and operationalizing features detailed in the functional design.
           1. Design/UI, from wireframes to CMS theming
           2. Site Building (hosting of old (during roll-out) and new sites - preferred option)
           3. Testing
           4. Deployment
     3. Integrated Site Search Tool
     4. Integrated Form Builder Tool
     5. Integrated Calendar Tool
        1. The University has formulated initial drafts of these documents, but the selected vendor will be asked to review and provide feedback in terms of how best to finalize each such document in alignment with the technical recommendations made.

(Appendix “D” for Information Architecture; Appendix “E” for site search requirements; Appendix “F” for form-building requirements; Appendix “G” for Calendar Requirements.)

* 1. MANDATORY: Vendor must include high-level conceptual technical design, build & implementation of the university site that incorporates the objectives in section 6 of the RFP document & this Appendix.
  2. MANDATORY: Vendor must submit in Vendor’s proposal a high-level Project Plan for the full scope of services described in this section. The Project Plan should demonstrate a suggested overall approach, sequence, and dependencies for accomplishing USM’s objectives as outlined in section 6.1. USM and awarded Vendor will work together throughout the contract to update and maintain the Project Plan.
     1. The Vendor must describe the project management processes that are followed by Vendor, specifically addressing change control and scope management; and the project management software the Vendor uses. Vendor should also describe their implementation methodology in depth including a typical task list and timelines for implementations along with responsibility assignments.
     2. Vendor must provide an organization chart identifying all personnel proposed for these projects and the chain of command inside the Vendor’s organization for that designated staff.
  3. MANDATORY: Upon contract award, the Vendor must commit personnel assigned to this project by name and guarantee that they will remain assigned to the project throughout its duration. Vendor must specify the percentage of time that each person will commit to the project. All project personnel must have previous experience appropriate to the proposed project assignment. Technical personnel must possess all requisite skills appropriate to their assignments.
     1. The Vendor must provide the necessary staff to direct, guide, and perform all aspects of the project, with limited USM support. Individuals must be available to work on the project once an award is made and a contract is signed. All Vendor staff members must be approved by USM prior to the start of the project. USM expects all named individuals to remain with their respective assignments as called for in the approved “Project Work Plans” except for extreme circumstances beyond the Vendor’s control. Any replacement or substitution of staff as proposed requires written approval from the State prior to replacement or substitution.
  4. USM and the awarded Vendor will review the high-level project plan included in the proposal and identify project components and phases that will be further defined in Statements of Work (SOWs) to be executed by both parties and incorporated into the Professional Services Agreement. The SOWs will be developed based on the awarded proposal and will further detail the deliverables and timeframe for the specific project component. The first deliverable after the contract award would be the technical site design & updates to the IA (as needed).
     1. For the USM.edu technical design and implementation components of the project scope, Vendor must, in Vendor’s response:
        1. Include a preliminary Work Plan for each of these components, including activities, tasks, proposed personnel, estimated hours for each task, timeframes for each project task, assigned resources by name and/or title, major project milestones, quality assurance checkpoints, and all scheduled deliverables with targeted start and end dates.
        2. Clearly define USM resource requirements and the skill levels required for each specified USM resource by deliverable.
        3. Include all phases of implementation technical (design, development, site-building, testing, go-live deployment), specifying tasks in terms of months, weeks, or days from Contract signing.

# References

Please return a minimum of three (3) Reference Forms, and if applicable, Subcontractor Reference Forms as specified in section 2.4.4 of the RFP document.

* 1. MANDATORY: Prime Contractor
     1. The Vendor must provide references consisting of Vendor accounts for comparable engagements within the last two (2) years, that USM may contact. Required information includes customer contact name, address, telephone number, email address, and engagement starting and ending dates. Forms for providing reference information are included later in this RFP section. The Vendor must make arrangements in advance with the account references so that they may be contacted at the Project team's convenience without further clearance or Vendor intercession.
     2. Any of the following may subject the Vendor’s proposal to being rated unfavorably relative to these criteria or removed from further consideration, at USM’s sole discretion: · Failure to provide reference information in the manner described · Inability of USM to substantiate minimum experience or other requirements from the references provided · Non-responsiveness of references to USM's attempts to contact them · Unfavorable references that raise serious concerns about material risks to USM in contracting with the Vendor for the proposed products or services
     3. References should be based on the following profiles and, as an aggregate, be able to substantiate the following information from both management and technical viewpoints:
        1. University web site technical design & implementations within the last twenty-four (24) months. Minimum of three completed projects
        2. For Vendor project manager and other key Vendor project team roles: reference project for which proposed resource had same role as proposed for this engagement: Minimum of one project per resource.
        3. For Vendor project manager and other key Vendor project team roles: reference projects on which proposed resource had a significant role: Minimum of three project references per resource.
     4. USM reserves the right to request information about the Vendor from any previous customer of the Vendor of whom USM is aware, including the procuring agency and/or other agencies or institutions of USM, even if that customer is not included in the Vendor’s list of references, and to utilize such information in the evaluation of the Vendor's proposal.
     5. Unless otherwise indicated in the Scoring Methodology in Section 6.3, reference information available to USM will be used as follows:
        1. As documentation supporting mandatory experience requirements for companies, products, and/or individuals, as required in this RFP;
        2. To confirm the capabilities and quality of a Vendor, product, or individual for the proposal deemed lowest and best, prior to finalizing the award.
     6. USM reserves the right to forego reference checking when, at USM's sole discretion, the evaluation team determines that the capabilities of the recommended Vendor are known to USM.
  2. Subcontractors
     1. The Vendor’s proposal must identify any subcontractor that will be used and include the name of the company, telephone number, contact person, type of work subcontractor will perform, number of certified employees to perform said work, and three (3) references for whom the subcontractor has performed work that USM may contact. Forms for providing subcontractor information and references are included at the end of this section. Unless otherwise noted, the requirements found in the References section may be met through a combination of Vendor and subcontractor references and experience. Vendor's proposal should clearly indicate any mandatory experience requirements met by subcontractors. NOTE: USM reserves the right to eliminate from further consideration proposals in which the prime Vendor does not, in USM's sole opinion, provide substantive value or investment in the total solution proposed. (i.e. USM does not typically accept proposals in which the prime Vendor is only a brokering agent.).

**REFERENCE FORM**

**Complete a minimum of three (3) Reference Forms that as an aggregate fulfill all requirements of this Section 24.**

Contact Name:

Company Name:

Address:

Phone #:

E-Mail:

Project Start Date:

Project End Date:

Description of product/services/project, including start and end dates:

**SUBCONTRACTOR REFERENCE FORM**

**Complete a separate form for each subcontractor proposed.**

Contact Name:

Company name:

Address:

Phone #:

E-Mail:

Scope of services/products to be provided by subcontractor:

**Complete a Reference Form for each Subcontractor proposed.**

Contact Name:

Company name:

Address:

Phone #:

E-Mail:

Description of product/services/project, including start and end dates:

(Appendix “D” for Information Architecture; Appendix “E” for site search requirements; Appendix “F” for form-building requirements; Appendix “G” for Calendar Requirements.)