

**UC Hastings responses to RFP 67-0172 Website Redesign & CMS Update**

Branding/Goals/Personas ..... 2

CMS Selection ..... 3

Staffing ..... 5

Timeline & Budget ..... 7

User Management ..... 9

3rd Party Systems ..... 11

Hosting ..... 17

Design..... 18

ADA and Certifications ..... 21

Analytics & SEO ..... 23

Content ..... 24

Advertising ..... 29

CRM/Newsletter ..... 30

Third Party Integration List ..... 32

## Branding/Goals/Personas

Question	Answer	Related Questions
<p><b>Please describe the existing UC Hastings brand platform. Is there an existing brand narrative, look and feel, and messaging in place to inform the new website redesign? Or is the institution looking for an agency partner to refine/refresh the UC Hastings brand platform for this initiative?</b></p>	<p>UC Hastings has a Brand Identity and Messaging Policy (<a href="http://www.uchastings.edu/news/identity-standards/index.php">http://www.uchastings.edu/news/identity-standards/index.php</a>) that was developed in 2014 and may be consulted in this project. The team is happy with the overall message of the school, but is open to new color schemes and other refinements as recommended.</p>	<p>Has UC Hastings undertaken any branding or positioning work that would apply to this project?</p>
<p><b>Has any persona work been done to clarify target audiences or does it need to be considered as part of this scope?</b></p>	<p>We have identified target audiences.</p>	
<p><b>What are some of the institutional goals your organization would like to accomplish with the new website?</b></p>	<p>The institution seeks to enhance site functionality for all stakeholders at Hastings (faculty, staff, students and others), to not only increase efficiencies within our own business processes internally, but also to better promote the College itself externally. We also seek to meet ADA accessibility standards so that the website is usable by people with disabilities.</p> <p>A list of peer sites were included in the RFP for reference and were selected based upon their modern design, mobile friendly interface, and the ease of finding information of the sites.</p>	
<p><b>How will these institutional goals be measured?</b></p>	<p>Customer satisfaction surveys; Google Analytics; 508 compliance met.</p>	

## CMS Selection

Question	Answer	Related Questions
<p><b>Is there any documentation of your content creation, review, and publishing workflow? Such that we could understand what the new system needs to do (at a minimum)?</b></p>	<p>Please consult the following:  <a href="http://uchastings.edu/about/admin-offices/it/cascade_how_to/index.php">http://uchastings.edu/about/admin-offices/it/cascade_how_to/index.php</a></p>	
<p><b>It appears Hastings is leaning heavily towards open source CMS solutions – the qualifications for the CMS technical analyst and consultant prizes ...”extensive knowledge and experience of building open source CMS websites”. Can Hastings provide its rationale to consider only open source solutions?</b></p>	<p>We are not only considering Open Source solutions, but price, licensing, and support costs will need to be taken into consideration with functionality offered.</p>	
<p><b>What are UC Hastings’ expectations as it relates to the new CMS? Will the new CMS be an open source solution? Is the institution open to CMS recommendations?</b></p>	<p>We are expecting the vendor selected to look at our use cases and requirements, and make a recommendation for what CMS would be best to implement.</p> <p>Please see the list of use cases as defined in the RFP. We are looking for a proposal that takes a look at our needs and situation, and makes a recommendation to move forward on the best platform for the requirements we have.</p>	
<p><b>Why did different departments move to WordPress? Was it a visual design or functionality issue? Did they have issues</b></p>	<p>Different departments moved to WordPress for its visual design and functionality and ease of use.</p>	

<p><b>with the Cascade CMS? Did WordPress solve the issues they had with Cascade?</b></p>	<p>We intend to migrate away from Cascade.</p>
<p><b>We are assuming you wish to completely migrate away from Cascade, but please confirm.</b></p>	<p>We intend to migrate away from Cascade.</p>
<p><b>You mentioned Drupal, Wordpress and Joomla as possible CMS solutions in the RFP, is there one solution you find more appealing than the others?</b></p>	<p>We are not only considering Open Source solutions, but price, licensing, and support costs will need to be taken into consideration with functionality offered.</p> <p>We have a WordPress license through Edublogs that many members of our faculty, students and staff, as well as College departments are using to create websites. Our community enjoys using WordPress for its ease of use, design capabilities, and commonplace in the market.</p>
<p><b>Is there a mechanism to export content programmatically from the Cascade CMS?</b></p>	<p>We do not want to do a large content migration. Ideally we want to build the new site with only the content we need.</p> <p>We envision that the design vendor will assist us with developing a migration strategy. Hastings staff then will be responsible for the actual migration phase. In the course of the web redesign, the design firm may end up doing some portion of the migration in order to test the new site design.</p>
<p><b>Can we be given a demo of your Cascade installation?</b></p>	<p>This help guide provides the best overview of our Cascade installation: <a href="http://uchastings.edu/about/admin-offices/it/cascade_how_to/docs/HelpDoc.pdf">http://uchastings.edu/about/admin-offices/it/cascade_how_to/docs/HelpDoc.pdf</a></p>
<p><b>Are there any specific limitations or requirements of the technological solution? Servers or languages that need to be, or should not be, used?</b></p>	<p>Nothing specific at this time, but we hope to work with consultants to identify best practices.</p>

## Staffing

Question	Answer	Related Questions
<b>How many firms are bidding on this?</b>	Unknown	
<b>Is there a specific request for a three-person team (CMS Consultant, Designer, and UX Strategist)? Or are those just areas of expertise that are missing from the internal team?</b>	<p>The areas of need in the RFP describe the type of personnel we feel is necessary to complete the website project. A CMS consultant, Designer, UX Strategist is missing from the internal team. Of course, we are open to other proposals.</p> <p>The work does not been to be done onsite. By embedded, we mean that it will be important for the resources to be available to work together at important ramp up work and key points of the project.</p>	Page 4, Scope of Work, the RFP indicates that there are areas of expertise missing to accomplish the required tasks: a CMS Technical Analyst/Consultant, a Web/User Experience Designer, and a User Experience (UX)/Content Strategist. Do you anticipate these roles being fulfilled by the selected vendor or are you looking to hire internally for these roles to work with the selected vendor
<b>Who is the team that will be dedicated and responsible for managing the site once it goes live? Is this team full-time UCH staff? What skills do they have? Should that be a consideration when nominating solutions? What can they be expected to learn?</b>	The website committee will, based on the chosen CMS, propose a solution for developing, updating and maintaining the web site post-production. However, we envision needed a few super users and one dedicated Website Administrator in-house to manage web content. We still anticipate allowing a small group of individuals to manage their own department’s web content. Expect the same level of expertise that would be preferred to manage a small, semi-amateur blog.	
<b>Is it Hastings intent to hire three independent consultants who will work mostly onsite to complement the college’s internal team?</b>	Not necessarily, we will pick the combination of one agency or a mix depending on what proposals are reviewed.	
<b>Please describe the day-to-day UC Hastings “client” team for this initiative.</b>	Right now, the web site is support by a Project manager, with some help by IT staff, and various people in the Hastings	

<p><b>What internal capabilities does UC Hastings possess in-house (e.g., graphic designers, content writers, web developers, etc.)?</b></p>	<p>community that update their own content. The project manager that has been brought in, along with the steering committee, will recommend the best set for supporting the sites in the future.</p>	
<p><b>Please describe the relationship/process UC Hastings envisions with an “embedded team.” What does this entail?</b></p>	<p>While all work does not be to done onsite, it would be important for resources to be available to work together at important ramp up work and key points in the project.</p> <p>We want the team to work proactively with the Project Manager who is in the internal team, have weekly check-ins, to ensure the project stays on track.</p> <p>The work does not been to be done onsite. By embedded, we mean that it will be important for the resources to be available to work together at important ramp up work and key points of the project.</p>	<p>On page 4, the RFP states that the ideal team to perform the project work would be “embedded”. Can Hastings clarify the expectations of the agency in respect to when the agency will need to be onsite and for what duration?</p> <p>Is there an expectation that the selected vendor will perform labor on-site? There was reference to an "embedded team" that was confusing.</p>
<p><b>Is the expectation that the process to design the new site includes information gathering and stakeholder interviews (internal and external) performed by the selected vendor? It seems the Website Project Manager will be responsible for these tasks, but the vendor would need to be intimately involved in order to maintain an intimate understanding of the findings and to provide recommendations and advice on how to act upon the requests/concerns of the users.</b></p>	<p>The Website Project Manager has conducted an initial information gathering and stakeholder interviews. She will be sharing these results with the selected vendor and will be in close collaboration with the vendor to assist in recommendations and advice for how to act upon those requests and concerns.</p>	

## Timeline & Budget

Question	Answer	Related Questions
<p><b>What is the anticipated project timeline for this initiative? When should the new website redesign launch? Please outline all key due dates and milestones to be mindful of throughout the scope of this engagement.</b></p>	<p><b><u>Phase one: Internal Content Audit (October 2016 – March 2017)</u></b></p> <p>Review requests from UC Hastings stakeholders for customized content, development, and design of the new website.</p> <p>Review website analytics, current web technologies and business processes in order to make recommendations on how to improve the overall structure and design of the web site.</p> <p><b><u>Phase two: Work with outside consultants to evaluate and select a new content management system for the external site, define the content needs of the website, approve new website designs. (May 2017 – May 2018)</u></b></p> <p>Work with a consultant to evaluate content management systems (CMS) platforms of the external website, with a target of July 2017 for presentation to the UC Hastings Board of Directors.</p> <p>Work with a User Experience specialist to define the content needs of websites and applications our teams create, working closely with our different departments to ensure the necessary content is sourced or otherwise generated.</p> <p>Work with a User Interface/Graphic Designer to select colors, fonts, as well as to arrange elements (such as images and blocks of text) in website layouts.</p>	<p>What is the desired launch date of the new website(s)?</p> <p>When is the anticipated launch date of the new web property?</p> <p>Does Hastings have a hard launch date?</p>

Recommend additional page design layouts or changes to existing designs, as well as approve global changes to structure, branding, look/feel, navigation and styling of the website.

Ensure compliance with all legal and regulatory standards, including accessibility.

**Phase three: Website Deployment (May 2018 – October 2018). No hard launch date, but before the beginning of the Fall 2018 academic year strongly preferred.**

Collaborate with the Website Project Manager to develop a website implementation plan, including communication strategy and training program.

Each department will have one to two months to create their respective content after the content strategy is completed. A separate content strategy will not be applied to each department.

Establish clear written policies and procedures that set high standards for site quality and content integrity.

Propose a solution for developing, updating and maintaining the web site post-production.

<b>What is the anticipated start date of the engagement?</b>	July 2017	
<b>What is the anticipated contract length for this initiative?</b>	Around a year	
<b>What is the anticipated budget for this initiative as it relates to agency fees, web production, travel, incidentals, etc.? If a</b>	\$150,000 - \$175,000 for consultant work. Any proposed costs for the new CMS and hosting solution will be approved by the UC Hastings Board of Directors separate from this agreement.	What is the budget range for the project? Will presentations to stakeholders be made remote or on-site? Design sessions,



<b>budget has not been determined, please provide a range for RFP participants to scope within.</b>	We can accommodate remote presentations and discussions. There are no travel requirements. If the vendor believes it would be most beneficial to have on-site meetings, it should be included in the vendor's proposal.	technology discussions, etc.? Are there any travel requirements (implicit or explicit)?
<b>How was the identified budget of \$150,000 to \$175,000 determined? Will proposals that exceed this be considered?</b>	The budget was based upon previous redesign initiatives and websites created from UC Hastings. Proposals exceeding that budget will be considered.	
<b>How is this project being funded? Is there a contract maximum that has been set for this procurement?</b>	Please refer to Procurement and Purchasing Policies here: <a href="http://www.uchastings.edu/about/admin-offices/fiscal-services/docs/section8_purchasing_procurement">http://www.uchastings.edu/about/admin-offices/fiscal-services/docs/section8_purchasing_procurement</a>	

## User Management

Question	Answer	Related Questions
<b>Approximately 150 users from 60 departments edit content for the website. Are you planning on maintaining the same number of users who have edit access on the current site? Also, will you require any specific user roles for these 150 users (i.e. users who have only specific access to specific areas of the site, etc.)?</b>	<p>The system allows for specific permissions, we've limited it to access at the department level, with certain individuals having access to multiple departments, as well as the entire site.</p> <p>We anticipate the number of users who have edit access to the current site to be reduced dramatically, at least by half. There should be roughly 10 admins who will have access to all areas of the website, but being able to restrict access based on a department or function would be desirable, but not required.</p> <p>We do not anticipate needing workflow permissions.</p>	<p>If there are "approximately 150 users from 60 departments edit content for the website" how many roles does the CMS need to support? Does each of those users have the same permissions? What granularity is needed for access control?</p> <p>The RFP mentions 150 users from 60 departments are responsible for editing content on the website. Does each user require specific permissions (edit/delete their own content only) or is access at department level?</p>

Page 3, Background, the RFP states that, "Approximately 150 users from 60 departments edit content for the website." Is there any access control in place that limits which sections editors have access to create and edit content? Is that a requirement in the new website

Page 4, Scope of Work: How many people on the UC Hastings need editing rights? Are there any workflows/permissions/levels of approval required?

**Are having the departments manage their own sites an acceptable solution for the University? That is, is that distribution of content into smaller sites necessarily a bad thing? Is a single site the right option?**

We have 150 Cascade users in 60 departments who create content with only one communications department charged with oversight. This has led to stale content, mixed-messaging, different branding conventions, etc. A charge of the redesign committee is to reevaluate the College's own structure for developing, updating and maintaining the web site post-production as part of its CMS evaluation.

Is there a publishing process, with reviews on staging and production? Any issues that need to be addressed? Features that should be preserved? The RFP mentions "editorial oversight of the content has been problematic," can you clarify how it has been problematic?

### 3rd Party Systems

Question	Answer	Related Questions
<p><b>Page 8, Use Cases and Expected Outcomes, Records, concerning the ability to “have a centralized academic calendar so that multiple departments do not keep different versions of calendars,” does this calendar need to integrate with any external systems? Will the records department manually manage the calendar or will it be managed by multiple stakeholders?</b></p>	<p>We do not anticipate this calendar needed to integrate with any external systems. The Records department would be responsible for the content of the calendar, put that department does not necessarily need to be responsible for managing its appearance on the external and internal website.</p>	
<p><b>Page 8, Use Cases and Expected Outcomes, Records , concerning the ability to “alert students to deadlines and send have available appropriate notices and policies of the department,” are these alerts sent to all users or alerts that are for specific users based on their status or information related to the account? Will all students have an account on the extranet or are these accounts only for users of internal systems</b></p>	<p>Internal Systems</p>	
<p><b>We briefly discussed this on Tuesday morning, and adding an addendum to the bid page relating to the 3rd party integrations, but I wanted to add a few follow up questions around that. Based</b></p>	<p>Business processes for the College, such as HR paperwork, student course registration, and financial aid processing will all be handled by external applications. Academic items such as seating charts, course management, and class recordings will be</p>	<p>What other software technologies are currently in place that need to be carried forward to the new site? Specifically those that are integrated at a code-level to the current site? Parallel servers or just linked</p>

**on the current list of 3rd party applications, which are you planning to keep moving forward on the new site? Based on the integrations you're planning to keep moving forward, are you able to provide additional notes on intended functionality for each?**

**This can be rough at this point; we simply want to ensure that we take the integration effort into account when providing our scope of work and estimate moving forward.**

handled by external applications. The library catalog will be embedded on the Library's homepage.

\*See 3<sup>rd</sup> party integration list.

There are links from the Hastings website to a Microsoft Exchange email web client. There are links from the Hastings website to a room reservation system that uses Ad Astra Calendar. There are links from the Hastings website to a web front-end portal for the Datatel ERP system, including student access to online registration, grades, account balance and payment, etc. All these external systems will continue to be used in the new web design.

content are not an issue, just those that are co-located on the same site or connected by code (API or otherwise). "Salesforce, Azure, and cloud based educational software" were mentioned, can you provide detail?

The RFP mentions several 3rd party integrations: RSS, Instagram, Twitter, Ad Astra, Expert Profiles, Exchange/Office 365, Datatel ERP, Salesforce, WebAdvisor and Canvas. Based on the pre-scope call, all integrations are either basic or external links. Please confirm if there are any additional integrations required and/or if any of the integrations require a more complex installation.

**Page 3, Background, the RFP states that "News and Events are handled via RSS using specialized asset factories and XHTML style sheets." Are these news and events posts being created natively within the Cascade CMS and being aggregated elsewhere? Or are the originating from elsewhere and being aggregated to the Cascade CMS? Do you require support for these specialized asset factories and XHTML style sheets moving forward with the new CMS**

Both actually. And yes, we will want to create RSS feeds and consume them going forward.

<p><b>In addition to Simplr, there are some password-protected blogs and SharePoint sites that will remain or need to be evaluated for departmental communications and planning between each other, students, and faculty.</b></p> <p><b>Is there a current list of the additional password-protected blogs and SharePoint sites that will need to remain? Will these need to be included in our project cost estimate and proposal at this time, or will they be evaluated and estimated at a later time? How are they hosted currently? Will you require and specific integrations of Simplr into the new extranet site? If yes, can you explain further?</b></p>	<p>We will be posting a list of sites that are in scope for this engagement. Other sites will be moved or dealt with at a later time.</p> <p>Just a link to them from the new site where applicable. We do not anticipate SharePoint being a factor in the new website.</p> <p>*See the list of sites and CMS</p> <p>We will not need specific integrations into Simplr. That being said, we will want to keep evaluating the best way to get our internally community routed to the content hosted in Simplr.</p>	<p>What SharePoint sites do we need to be aware of? Is there any actual integration that needs to happen, or just listing a link to them from the new site?</p>
<p><b>Are you currently using third party software for HR or job postings?</b></p>	<p>UC Hastings HR Department posts PDF descriptions of external job openings on its website here: <a href="http://uchastings.edu/about/admin-offices/human-resources/employment/index.php">http://uchastings.edu/about/admin-offices/human-resources/employment/index.php</a>. At the bottom of each PDF job description is a link that takes users to an external application, HR Net, where they may apply for the position.</p> <p>We do not need a job posting database for this website.</p>	<p>Does an HR job-posting database/site exist? Or does that need to be created? Is this for the entire school or separate per department?</p>
<p><b>Will the Human Resources posts about performance reviews, forms, benefits, and links to tools and policies need to be private or password protected? Or will these be public on the front-end of the site?</b></p>	<p><b><u>Hiring:</u></b> Internal: Procedure for departments, workflow tasks, internal job postings; External: Pay bands, external job postings</p> <p><b><u>Onboarding:</u></b></p>	<p>Page 6, Use Cases and Expected Outcomes, Human Resources, do you require the system to simply provide the ability to “post and remove external job postings” with information/links on how to apply? Or should it provide a mechanism by which</p>

	<p>Internal: Forms such as W2s, direct deposit; Requests to order equipment for staff; External: Benefits information such as medical, dental, retirement, perks, etc.</p> <p><b>Labor/Union:</b> Internal: Contracts; External: Notices of Meetings</p> <p><b>Payroll:</b> Internal: Time reporting and pay schedule</p> <p><b>Performance Management</b> Internal: Performance evaluation forms, Policies regarding employee management, Continuing education applications such as Atomic Learning and Lynda.com.</p>	<p>applicants can apply for the job and the HR department can review/process Applications?</p> <p>Page 7, Use Cases and Expected Outcomes, Human Resources , concerning the ability to “post notices about performance reviews, forms, and, benefits,” is this (or any other HR content) going to be made available only to authenticated users who are signed into the Website</p>
<p><b>Page 7, Use Cases and Expected Outcomes, General Counsel, concerning the ability to “post and expire Board notices and supporting PDF files, and link the current notices and documents from a central index, archive documents on the site for the past two years, is this (or any other HR content) going to be made available only to authenticated users who are signed into the website?</b></p>	<p>Board Notices and materials from the General Counsel's office will need to be made available to the public. Most HR content should be kept internally on an intranet accessible only to authenticated users.</p> <p>UC Hastings will be responsible for the migration of content from the General Counsel’s office to the new external website.</p>	<p><b>Will you require the vendor to migrate all files, documents, etc. from the current site, to the new CMS?</b></p>
<p><b>Can you provide detail on your level of expected Salesforce integration for the new site?</b></p>	<p>Not a heavy integration at all; linking at most.</p>	
<p><b>How would you like to alert students? Would this be an email alert system or posting these ‘alerts’ or ‘notices’ somewhere specific on the site? We made</b></p>	<p>The functionality that you describe would work well for our purposes. We find that students are not as responsive to email.</p>	

**a deadlines post type for Harvard which tracked all key deadlines across the law school — would this type of functionality work for you?**

**What is currently being routed between the CMS and Salesforce, and what needs to be maintained within the new CMS? What are you using Salesforce for currently?**

- Desk.com for IT Help Desk and Facilities requests
- Chatter for internal communications
- Adjunct faculty contracts are processed online with electronic signatures using Salesforce, DocuSign, and Box with the plan to move Student Hires and Regular Staff and Faculty onboarding to this application over the summer
- Applications for student organization registration is online utilizing Salesforce, DocuSign and Box
- Student-completed Professor and Course Evaluations utilizing Salesforce
- Project management for IT initiatives is handled internally through Salesforce, Jira and Box
  - Position control database in Salesforce – details Hastings’ state, career positions: Budgeted FTE for the position; Budgeted Annual Cost of the position; Date position was established; Incumbent’s start date in position; Incumbent’s end date in position;
- Position’s active status; Position’s funding source/cost center; Position’s job code;
- Position’s department; Position’s collective bargaining status; Position’s exempt/nonexempt status; Position’s reporting category/code (i.e., IPEDS, ABA, Census).• In the planning stages to expand use of Salesforce to CRM for student and alumni relations

Page 8, Use Cases and Expected Outcomes, Records , concerning the ability to “have digital forms that students can fill out online without having to print a fill out a paper copy,” approximately how many forms will need to be created? Do submitted forms need to simply be made available to Records staff to be processed manually or is there any automation required?

**What are we expected to do with Simplr?**

Provide recommendations for information organization.

Page 2 refers to increasing functionality for internal audiences (students, faculty, etc.).

Page 4 references that you are currently using Simpplr as your Intranet. Is designing/developing the Simpplr site a part of the scope of this project?

Page 4, Scope of Work, the RFP states that a key component will be “a new content management system for the extranet (TBD), and a separately supported intranet/document management solution called Simpplr to help various UC Hastings stakeholders locate needed information and services as easily as possible.” Is the implementation and configuration of Simpplr within the scope of this project or is it being implemented concurrently by another party?

**"Analyze and document detailed online interfaces" — how many of these are there to analyze?**

\*See the list of sites and CMS

**Can you explain what/how "tasks are routed between the Simpplr/Salesforce 'intranet' environment"? What does this entail and how much of this will be preserved?**

We intend for some internally business processes to be routed through Salesforce and Simpplr. For instance, staff onboarding post-hire: filing paperwork and watching requisite training videos will be internal. Student evaluations of courses are handled through Salesforce. Requests for IT or facilities assistance will be handled through Salesforce/Simpplr.



## Hosting

Question	Answer	Related Questions
<p><b>Will Hastings IT manage the CMS set up and implementation? Integration with legacy systems? Hosting?</b></p>	<p>Hosting and assistance with integration. Vendor will need to provide set up and implementation or at least lead. We anticipate reviewing hosting solutions based upon the CMS recommendations.</p> <p>Today our main site is hosted on Azure, so the selected vendor will work with Hastings IT staff to ensure that the correct decisions are made.</p> <p>We are open to a cloud managed hosting solution, not hosted internally by IT staff, based on the review of the CMS.</p>	<p>Where do you host the current site? Are you looking to find a new hosting provider for the site(s) or will these be hosted internally and handled by UC Hastings's IT staff?</p> <p>Is a hosting solution apart of the scope of work? Are you open to a cloud managed hosting solution?</p> <p>Is the final system to be hosted on-campus, or would remote servers be considered?</p> <p>Are cloud-based solutions an option</p>
<p><b>Please clarify the scope of work – will the selected agency be responsible for all aspects of defining and implementing the website strategy, information architecture, content strategy, user experience, visual design, coding and development, testing and deployment of the new extranet site and intranet?</b></p>	<p>Just the extranet for the tasks mentioned. We would also like guidance on information architecture for the intranet.</p>	
<p><b>Has the Simplr solution been implemented?</b></p>	<p>Yes, it is in progress internally, but has not yet been released to the general UC Hastings community.</p>	

## Design

Question	Answer	Related Questions
<p><b>The RFP mentions proficiency in HTML, CSS and JS for rapid prototyping. What are your expectations for prototypes? Are you looking to test and gather feedback on UX designs? Are you looking to evaluate the responsive experience?</b></p>	<p>We are looking to test and gather feedback on UX designs and responsive experience from our advisory committee. Ideally, these would be working prototypes so we can test and see how they will work.</p>	
<p><b>Does Hastings have a preferred design and development approach for the project?</b></p>	<p>No preferred specific approach.</p>	
<p><b>How many people are on the UC Hastings project team assigned to this project? What are their roles? What is the approval process for major milestones of this project? Is there a specific department inside of UC Hastings School of Law leading this project?</b></p>	<p>The redesign process led by the IT Department, in collaboration with an executive advisory committee comprised of faculty and law school department leads. Major milestones will be approved by the committee as a whole, with more minor, day-to-day tasks and processes facilitated by IT.</p> <p>The Committee is composed of:</p> <p><b>IT members (4)</b></p> <ul style="list-style-type: none"> <li>• Associate Dean for Library and Technology (Committee Chair)</li> <li>• Website Project Manager</li> <li>• IT Project Manager</li> <li>• Deputy CIO</li> </ul> <p><b>Appointed members (9)</b></p> <ul style="list-style-type: none"> <li>• Director of External Relations</li> </ul>	<p>Describe the decision making process for approving design and templates? Will focus groups or multiple stakeholders be required as part of the process? Please describe. Do you have any expectations for the number of design options to be offered?</p> <p>How many people on your team will be involved in the project day to day / in charge of approvals?</p>

- Chief Development Officer
- Director of Admissions
- Chief of Staff to the Chancellor and Dean
- Assistant Dean of Student Services
- Assistant Dean for Office of Career and Professional Development
- Academic Deans Office Administrative Staff
- Faculty Member
- Student Representative

**Phase one: Internal Content Audit (October 2016 – March 2017)**

Review requests from UC Hastings stakeholders for customized content, development, and design of the new website.

Review website analytics, current web technologies and business processes in order to make recommendations on how to improve the overall structure and design of the web site.

**Phase two: Work with outside consultants to evaluate and select a new content management system for the external site, define the content needs of the website, approve new website designs. (May 2017 – May 2018)**

Work with a consultant to evaluate content management systems (CMS) platforms of the external website, with a target of July 2017 for presentation to the UC Hastings Board of Directors.

Work with a User Experience specialist to define the content needs of websites and applications our teams create, working

closely with our different departments to ensure the necessary content is sourced or otherwise generated.

Work with a User Interface/Graphic Designer to select colors, fonts, as well as to arrange elements (such as images and blocks of text) in website layouts.

Recommend additional page design layouts or changes to existing designs, as well as approve global changes to structure, branding, look/feel, navigation and styling of the website.

Ensure compliance with all legal and regulatory standards, including accessibility.

**Phase three: Website Deployment (May 2018 – October 2018). No hard launch date, but before the beginning of the Fall 2018 academic year strongly preferred.**

Collaborate with the Website Project Manager to develop a website implementation plan, including communication strategy and training program.

Each department will have one to two months to create their respective content after the content strategy is completed. A separate content strategy will not be applied to each department.

Establish clear written policies and procedures that set high standards for site quality and content integrity.

Propose a solution for developing, updating and maintaining the web site post-production.

<p><b>What do you mean by "this is the first major movement to separate internal from external content college-wide"? Are we a participant in that process, or is the designation between content already defined, and we would just be placing them in different locations of the site?</b></p>	<p>Much of the content has been defined; however, the participants in this process will help us designate the best locations for this content and information architecture for the external and internal (Simpplr) site.</p>	
<p><b>Is the implication that we are building more than one site? Internal and external?</b></p>	<p>Building an external site, with a recommendation for how to best structure/organize content on the internal site.</p>	
<p><b>Could you provide a list of websites that you like or find visually appealing?</b></p>	<p>(See reference peer sites from the RFP)</p>	<p>Could you provide a list of websites that you like or find visually appealing?</p>
<p><b>Reference/peer sites were listed in the RFP. Are there specific elements you like about each of these examples?</b></p>	<p>Modern design, mobile friendly, easy for everyone to find information.</p>	
<p><b>Is the goal of a single site to have visual consistency across content/pages?</b></p>	<p>One requirement of the site is that all pages satisfy the chosen branding and color scheme, and that all content/pages conform to accessibility standards.</p>	

## ADA and Certifications

Question	Answer	Related Questions
<p><b>The next CMS must incorporate accessibility so that it is usable by people with disabilities, in line with ADA</b></p>	<p>Website must meet the Web Content Accessibility Guidelines (WCAG) 2.0 at level AA Success Criteria.</p>	

<p><b>standards. We have trained accessibility experts on our team that will be able to assist with this, however do you have any specific accessibility guidelines (outside of ADA standards) that we should be aware of? For example, WCAG 2.0 AA?</b></p>	
<p><b>Do replying vendors need any specific University of California vendor certifications or registrations?</b></p>	<p>No</p>
<p><b>The next CMS must incorporate accessibility so that it is usable by people with disabilities, in line with ADA standards. We have trained accessibility experts on our team that will be able to assist with this, however do you have any specific accessibility guidelines (outside of ADA standards) that we should be aware of? For example, WCAG 2.0 AA?</b></p>	<p>Website must meet the Web Content Accessibility Guidelines (WCAG) 2.0 at level AA Success Criteria. UC Hastings wants a website that can be access but all, but especially those with visual impairments. Please include costs associated with manual user testing where appropriate.</p>
<p><b>How many departments have unique sub-sites? How many sub-sites are there?</b></p>	<p>*See list of sites in scope – We believe that there are approximately 20 active, unique sub-sites.</p>
<p><b>As part of the goals, the RFP mentions making adjustments to the site to account for trends in marketing and recruitment. How much weight does the marketing, enrollment and recruitment departments have in the context of this website redesign project? In other words, is improving the site for marketing and enrollment a central goal?</b></p>	<p>Improving the external site for marketing and enrollment is a central goal. The information architecture should reflect a desire to promote UC Hastings strengths on the external site, while making internal business processes more discoverable and easy to access through the intranet.</p>

**The RFP references making the website accessible to people with disabilities and "in line with the ADA standards"? Please clarify the scope of this request.**

- **What are your Accessibility goals for this project?**
- **What is the criteria by which accessibility will be evaluated? Section 508 guidelines, WCAG 2.0 guidelines; level A, AA or AA, etc.**
- **Are there specific accessibility groups you are focused on?**
- **Giving that approximately only 20% of access ability issues can be resolved using programmatic testing, should manual user testing be covered under this RFP?**

Website must meet the Web Content Accessibility Guidelines (WCAG) 2.0 at level AA Success Criteria. UC Hastings wants a website that can be accessed by all, but especially those with visual impairments.

Please include costs associated with manual user testing where appropriate.

## Analytics & SEO

### Question

**Apart from Google Analytics, Media Math and Datalogix, do you have plans for other Analytics tools?**

### Answer

We track newsroom traffic and media hits via Google analytics and other tools, but there would be much to gain by better tracking conversation rates for business objectives such as advancement and enrollment and we would be very open to the design firm to assisting us in delineating possible services for prospective and current students, alumni, staff and faculty.

The Admissions Office does not monitor website traffic;

### Related Questions

	however, they do monitor yield broadcast emails, which are sent through a tool called Fire Engine Red.	
<b>Please confirm that UC Hastings will manage the set up and management of the analytics tools.</b>	Confirmed, UC Hastings will manage the set up and management of the analytic tools.	
<b>Will UC Hastings handle redirect links for all/any retired content, or will that be on the agency to perform?</b>	We will handle and/or provide direction for redirect links for retired content.	
<b>Are SEO services apart of the requested services?</b>	SEO strategy and implementation should be part of this RFP, particularly as it corresponds to our 508 requirements.	Is SEO strategy and implementation part of this RFP? Is part of the content deliverable to establish keywords, and push out suggestions to content editors? If not, how will SEO be handled?
<b>In addition to Google Analytics, what kind of visitor tracking and or digital campaigns would need to be integrated into the site?</b>	In part, we would expect the design firm to assist us in delineating possible services for prospective and current students, alumni, staff and faculty. For example, we might want to develop technologies to allow user customization of content based on interest.	

Content		
Question	Answer	Related Questions
<b>Is it a foregone conclusion that the content is not well organized and will need to be revised? Or just that it should be evaluated for restructuring?</b>	For the most part, yes, we've concluded that the content is not well organized and will need to be reorganized/reviced, and in some cases, rewritten by our staff.	Is it a foregone conclusion that the content is not well organized and will need to be revised? Or just that it should be evaluated for restructuring?



**Please define what sites are to be included within “uchastings.edu and associated web properties.” What does this entail?**

A site list will be included with the updated addendum, The sites that are listed in this document are within the scope that need branding or will need branding include:

Site	Hosted/CMS
cgrs.uchastings.edu	Drupal
cndr.uchastings.edu	Azure/Cascade
library.uchastings.edu	Azure/Cascade
opportunity.uchastings.edu	Dreamhost/Wordpress
sites.uchastings.edu	EDU Blogs/ Wordpress
building.uchastings.edu	wpengine/rackspace
<u>journals.uchastings.edu</u>	Azure/Cascade
<u>haiti.uchastings.edu</u>	Azure/Cascade
gov.uchastings.edu	Azure/Cascade
hicj.hastings.edu	Azure/Cascade
uconsortium.org	Wordpress

We will not need specific integrations into Simplr. That being said, we will be wanting to keep evaluating the best way to get our internally community routed to the content hosted in Simplr.

We also currently use Expert Profiles to generate content for our faculty bios pages, but we anticipate moving away from this product. <http://uchastings.edu/faculty/index.php>

Please provide URLs to all websites, subdomains and related/associated sites that are part of the scope of work. Will any of these properties have a unique look and feel from the new extranet site? If so, please elaborate on the requirements for each property.

What are the "associated web properties" that need visual updates in addition to the main site?

Please provide a list of all small sites/subdomains that are to be included as part of the rebuild.

**Does UC Hastings intend to retire/redirect stale content referenced, or update this content?**

We intent to retire stale content, only updating what is determined to be important and relevant to the College. In anticipation of this RFP, we have tried to remove as much stale content as possible from our

	<p>website and webserver. A list of stale content will be provided for consideration if requested. We will programmatically remove content from the Cascade server as needed.</p>	
<p><b>Assuming a list of stale content would be provided for consideration for removal in the content strategy, but please confirm.</b></p>	<p>Yes</p>	
<p><b>The UX role mentions the task of "defining the content needs of web sites and applications our teams create" — besides the main site, what sites is this referring to? And what are the applications? Is there a description of the applications somewhere?</b></p>	<p>Correction: defining the content needs of the website and applications our teams create. (List of applications provided in this document).</p>	
<p><b>Is the content strategy role going to be applied to each department individually? If so, how many departments will require this service?</b></p>	<p>A separate content strategy will not be applied to each department.</p>	
<p><b>Do the approximate 3,500 pages include both internal and external pages? Are all the pages housed in the same CMS?</b></p>	<p>This is the number of pages that can be spidered from the external site.</p>	
<p><b>What does "sourcing new content" entail? Can you provide an example?</b></p>	<p>Identify where new editorial content is needed for our website. For example, evaluate how we provide information about our LLM Program and determine if it is being presented effectively for that target audience; and if not, how we could improve the content delivery, either in the textual description of the program, the visual presentation of the content, or the organization/location of the content.</p>	

<p><b>According to the pre-scope call, UC Hastings will be providing all content (copy and visuals). Will UC Hastings be populating the content on the new site or will the selected agency be responsible for migrating the existing content? If agency is responsible for content migration, at what point will UC Hastings personnel assume responsibility for content edits/entry? Post launch or during the development phase?</b></p>	<p>We envision that the design vendor will assist us with developing a migration strategy. This would entail training Hastings staff in best practices. Hastings staff then will be responsible for the actual migration phase. In the course of the web redesign, the design firm may end up doing some portion of the migration in order to test the new site design.</p>	<p>Page 3, Background , the RFP mentions that “various departments have migrated and independently moved to UC Hastings WordPress sites in addition to having pages still in Cascade that have stale content.” Do you anticipate needing to perform content migrations from these WordPress websites to the new CMS in addition to the “approximately 3500 pages of active content” in the Cascade CMS?</p>
<p><b>How long will each department need to create their respective content after content strategy is completed?</b></p>	<p>One to Two months</p>	
<p><b>What are UC Hastings’ expectations as it relates to developing new content for the website redesign? Will the selected partner be responsible for developing/refreshing new content and/or migrating old content? Do you have additional internal resources to help source/create content?</b></p>	<p>The Websites Project Manager will help lead content coordination with the Director of External Relations and respective law departments to assist with content refreshment as needed. Ideally, we will take what we have and use what is appropriate to refresh and update content as needed and ongoing.</p>	<p>What are UC Hastings’ expectations as it relates to developing new content for the website redesign? Will the selected partner be responsible for developing/refreshing new content and/or migrating old content? Do you have additional internal resources to help source/create content?</p>
<p><b>It has approximately 3500 pages of active content. Based on Tuesday’s call, it sounds like you are planning to work with the chosen vendor to provide a content and architecture strategy for the new site, based on this you will determine what content needs to be migrated to the new CMS</b></p>	<p>Correct. We assume that we will need minimal assistance with the migration based on our internal content audits.</p>	

<p>— is that correct? Will you need our assistance with this migration?</p>		
<p><b>Will the selected RFP partner have the ability to conduct a discovery/content sourcing phase at the on-set of this initiative? (e.g., campus visits, stakeholder interviews, review/audit existing research, etc.)</b></p>	<p>Yes, if desired, it should be included in the vendor’s proposal. The Website Project Manager has conducted an initial information gathering and stakeholder interviews. She will be sharing these results with the selected vendor and will be in close collaboration.</p>	
<p><b>How many pieces of content (web pages, images, files, etc.) do you anticipate needing migration and what source(s) will these be migrated from?</b></p>	<p>This will be a site rebuild rather than a migration for the most part. Hastings and the vendor will work together to ensure the identified content is on the new site.</p>	<p>Will you require the vendor to migrate all files, documents, etc. from the current site, to the new CMS?</p>
<p><b>Do online forms exist on the site? Are they part of the CMS or hosted elsewhere? How many of these forms exist? Will a tool to create new forms be required?</b></p>	<p>Most forms on the UC Hastings website are in PDF form and use email for sending the data results. The College also uses Qualtrics to survey students and RegFox for event registration and payment. A tool to create new forms will not be required; however, it is preferable for the CMS to allow for minor form/survey creation. The College is in the process of implemented DocuSign, Box and Salesforce controls for certain required paperwork.</p>	<p>Are you planning a secure transaction form and automated process for the giving section? Or are you open to using a third party to processes these transactions?</p>
<p><b>Of the 3500 pages of active content currently on the site, if known, approximately how many pages will need to be evaluated for use in the new website?</b></p>	<p>It will be up to the selected vendor to help the College define appropriate strategy for the new site and help set policies for what content should be moved into a new site.</p>	
<p><b>Will Hastings supply all content for the website – copy, photography, video, etc.?</b></p>	<p>Yes</p>	
<p><b>Will Hastings migrate the content to the new CMS?</b></p>	<p>The expectation is for Hastings to work with the vendor to determine what we should include in the initial website launch. We anticipate</p>	

	minor conversion of content from the old CMS to the new, the majority of which will be handled internally at UC Hastings.	
<b>The RFP states: "Many of the regularly updated sections of the website have solutions that have been over-engineered for a non-technical audience to be able to keep up to date and maintained and therefore have become stale." Can you explain this in more detail?</b>	A lot of listings and pages that could have easily just been manually maintained, had dynamic indexing and navigation solutions applied to them, which many of the users found hard to use.	
<b>Page 8 references Alumni &amp; Development needs. Is developing an Alumni Portal part of the scope of this project?</b>	We do have an alumni portal, we do need to rebrand it and integrate it better with our main site. The RFP does not cover replacing this portal, however.	
<b>Are you planning a secure transaction form and automated process for the giving section? Or are you open to using a third party to processes these transactions?</b>	We use a third party to process transactions.	

## Advertising

Question	Answer	Related Questions
<b>What advertising methods are you using to drive traffic to the website?</b>	Social media (Facebook, Instagram, Twitter, LinkedIn, Google+), email, and occasional advertisements in legal trade media outlets (such as Politico, Above the Law, and	

	<p>the Daily Journal). We did some print and online ads in UC campus newspapers for the JD program this year.</p>
<p><b>How are you tracking conversion rates? Is this something that should be considered for this</b></p>	<p>We track newsroom traffic and media hits via Google analytics and other tools, but there would be much to gain by better tracking conversation rates for business objectives such as advancement and enrollment and we would be very open to the design firm to assisting us in delineating possible services for prospective and current students, alumni, staff and faculty.</p> <p>The Admissions Office does not monitor website traffic; however, they do monitor yield broadcast emails, which are sent through a tool called Fire Engine Red.</p>

## CRM/Newsletter

Question	Answer	Related Questions
<p><b>As part of your recruitment efforts, do you engage in CRM activities to drive user engagement? If so, what email service provider are you using to distribute your emails? Does this need to be integrated into the site?</b></p>	<p>We intend, at a future date, to develop and deploy Salesforce CRM that could be used in tandem with ACES2.</p>	
<p><b>As part of any CRM activities, do you currently have an email template?</b></p>	<p>Right now, we do have notifications and plan to use the Simplr newsletter templates.</p>	



### Third Party Integration List

3 <sup>rd</sup> Party	Integration
Facebook	Link to only
Instagram	Link to only
Twitter	Link to only
YouTube	Link to only
Google Plus	Link to only
Ad Astra Calendar (via RSS)	Rss feeds go into Feedburner now
ExpertProfiles (via iframe)	Bring in content via an iFrame
Exchange/Office 365	Link to only
Datatel ERP system (student registration, grades, account balances),	Link to only
Salesforce (KScope)	Link to only
WebAdvisor	Link to only
Canvas learning management system	Link to only
Google Webmaster tools	SEO
Feed burner	Recently started running rss feeds from Astra in here for data cleanup
Google Analytics	track page statistics
Library Scholarship Repository	Link to only
Library Research Guides (LibGuides)	Link to only
Library catalog (Encore)	Embedded links and search boxes