



Request for Proposal 18-025

Website Content Management System

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Calendar of Events

Issue date		March 15, 2018
Deadline to indicate attendance at the Pre-Proposal Conference / Deadline for requests for RFP Interpretation	4:00 p.m. CDT	March 28, 2018
Mandatory Pre-Proposal Conference / All questions will be answered at the conference	2:00 p.m. CDT	March 29, 2018
Phase 1 Technical Proposals and Price Proposals Due	2:00 p.m. CDT	April 10, 2018
Notification of shortlisted vendors selected for Phase II Oral Presentations and Price Discussion	5:00 p.m. CDT	April 16, 2018
Phase II Oral Presentations and Price Discussion by selected number of vendors	TBD	April 23-27, 2018
Anticipated Selection of Proposers(s)	3:00 p.m. CDT	April 30, 2018
Contract(s) will commence on dates mutually agreeable to the University and Proposers(s) if awarded		

NOTE: Troy University reserves the right to request additional information or initiate additional conversations with proposers at any stage of the Calendar outlined above.

**Dates listed above are subject to change.

Introduction

Troy University (TROY or the University) is soliciting proposals for website content management system (CMS) services. These services may include, but are not limited to, the content management system, implementation services, training and hosting environment.

The Project

TROY is currently engaged with a front-end design vendor in a comprehensive redesign of its public-facing web presence. As part of this comprehensive redesign process, the University seeks to implement a new content management system (CMS) and explore a move toward cloud hosting of its public-facing website. The project will require a CMS partner to manage back-end implementation of a newly designed site framework that includes a new sitemap / information architecture and a new visual design to be delivered as front-end (HTML, CSS, JS) site files. The University will also require the CMS vendor’s support in migrating existing site content (along with some

newly developed content) ahead of the University's target launch date of Fall 2018. The selected proposer(s) will work with the Offices of Marketing and Communication and Information Technology to achieve the University's goal to transition the primary external Troy University web properties to a CMS that is geared toward higher education institutions. This higher education requirement has been identified as being of upmost importance, and therefore require any potential CMS vendor to provide software that caters to the specific needs of higher education institutions. For example: Software must offer the ability to easily create and manage course catalogs, faculty/staff directories, etc. The University has also determined that to fulfill these stated requirements, no open-source content management systems will be evaluated. Furthermore, the potential vendor must furnish a list of institutions they are working with currently or have worked with in the past.

Goal

The University's overall goal associated with this RFP is to establish a content management system for use on the primary external University website(s). This includes, but is not limited to, the following elements:

- An easy-to-use higher education focused content management system (CMS)
- Easy updating of content by key leaders in communication, marketing, information technology, colleges and other areas
- Social media integration
- Blog integration (<https://www.troy.today>)
- Integrated analytics data
- Search Engine Optimization (SEO) best practices
- Meeting or exceeding Section 504/508, (WCAG) 2.0 Level AA accessibility requirements
- Integration with existing services or products
- Full templating capability
- Workflow and user management
- Excellent support

Timeline

Anticipated selection of proposer(s) is set for April 30, 2018. The launch schedule for TROY's new external website (troy.edu) has been mandated for Fall 2018. This timeline is critical and all phases of work must accommodate this launch timeline priority. We will require the selected vendor to meet with our front-end design partner immediately upon selection to review design mock-ups for key page types and provide input on technical requirements that should factor into the development of front-end site files. Our front-end design partner will complete front-end development and hand off site files for back-end implementation no later than August 15, 2018. We expect the CMS vendor to accommodate a three-month timeframe for all back-end development, content migration and pre-launch activities to accommodate a site launch no later than Nov. 2018.

The Troy University Story

Educate the mind to think, the heart to feel, the body to act. – TROY Motto 1887

Founded in 1887 in Troy, Ala. as a normal school, today Troy University reaches students around the world through quality classes offered in face-to-face, online and blended/hybrid formats. TROY is a student-focused, public institution serving 23,000+ traditional, non-traditional and military students.

Brand Attributes

Troy University's brand attributes are:

- International (global)
 - Accessible
 - Large, far-reaching
 - Multicultural
- Friendly, with a "culture of caring"
 - Warm
 - Inviting
 - Individual attention/students are known by name
- Proven
 - 130+ years of tradition and excellence
 - 155,000+ alumni worldwide
 - Accredited by the Commission on Colleges of the Southern Association of Colleges and Schools
 - Quality academics
 - Winning Division I athletic programs
 - 60+ years of services to military-affiliated students
- Responsive to markets, communities and individuals
 - Lifelong
 - Supporting resources
 - Affordable
- Value-centered
 - Community / Service oriented
 - Respected
- Forward-thinking
 - Creative
 - Innovative
 - Entrepreneurial
 - Agile

TROY Locations

A list of Alabama campuses, service centers and international sites is located at troy.edu/campus-locator.html

TROY Focus Areas and Target Audiences

TROY focuses digital resources on several strategic areas, communicating to a range of audiences.

- Enrollment and retention
 - Traditional prospects and current Troy Campus students
 - High school students
 - Transfers from other institutions and from two-year schools
 - Parents
 - Nontraditional prospects and current in-class or TROY Online students
 - Online and hybrid / blended (online and in class)
 - Adult prospects with some higher education experience transferring credits from another institution
 - Adult prospects with no previous higher education credits
 - Military / veteran / military family prospects and current students
 - Online and hybrid / blended (online and in class)
 - All military branches
 - Active duty and retired
 - International prospects and current Troy Campus students
 - Top seven countries represented at TROY: China, Nepal, India, Vietnam, Saudi Arabia, Nigeria and South Korea
 - Prospect categories:
 - Prospects wishing to study in the United States as full-time undergraduate or graduate students
 - Prospects wishing to study English as a Second Language (ESL)
 - Prospects wishing to study abroad with a partner institution
 - Other target: Parents making financial / travel decisions
- Athletics
 - Corporate partners
 - Alumni and friends
 - Sports enthusiasts
 - NOTE: The Troy athletics website is not included in the scope of this RFP.
- Advancement / Development
 - Corporate partners
 - Alumni and friends
 - Grantors and charitable organizations
- Legislative and government affairs
- State, federal and local officials, boards and regulatory bodies
- Peer institutions

Research Resources

The following pages may be useful in providing proposers relevant background and a sense of TROY's institutional identity.

- Fact Site (troy.edu/factsite)
- Mission Statement (troy.edu/mission-statement.html)
- Awards and Accolades (troy.edu/awards-and-accolades.html)
- Social Media (troy.edu/social)
- Apps (troy.edu/app)
- Magazine (troy.edu/magazine)
- Trojan News Center (troy.edu/news)
- TROY Today – University blog (troy.today)

Scope of Services

Troy University is seeking proposals for the implementation of a website content management system as part of a comprehensive website redesign already underway. Other services may be requested as needed under the resulting contract(s). Proposals should specifically address the following components/questions listed under requirements.

TROY reserves the right to award to one proposer, multiple proposers, make a partial award, or no award as deemed in its best interest.

Website Service Categories

Each proposer must specify the categories of website and digital services for which it is submitting a proposal and respond accordingly as specified in this solicitation document.

1. Content Management System (CMS)
 - a. CMS implementation, including back-end implementation of newly designed front-end site files
 - b. CMS hosting
 - i. Cloud
 - c. Staging server / Sandbox
 - d. Production web server
2. Expert Services
 - a. Content Migration
 - b. Technology / Development
 - c. Consultation
 - d. Training
 - e. Other_____

Phases of the RFP

Phase I:

In Phase I, all proposers will provide a Technical Proposal demonstrating the categories of offered services and a Price Proposal to cover all offerings. See Appendix A for the Technical Proposal Transmittal Form and Appendix B for the sample Price Proposal.

Phase II:

In Phase II, selected proposers will be asked to provide an Oral Presentation and Price Discussion in person. Additional details will be provided to those selected to participate including the topics, time periods, and requested key personnel.

Contract Award:

The successful proposer(s) shall submit a proposed agreement(s), the scope and terms of the contract shall consist of the RFP, any amendments thereto, and the vendor's proposal in response to the RFP.

RFP Requirements

Proposers submitting a response to this RFP must be aware and willing to perform all requirements listed in the following sections: General, Phase I, Phase II and RFP Award Requirements, as well as any subsequent requirement additions and/or edits made through official RFP addenda(s).

Website Content Management System Requirements

Each proposer should meet the criteria listed below and elaborate in detail as to how their software meets the specific criteria. NOTE: The following is intended to serve as a summary overview of critical project requirements. For additional questions each proposer should address as it relates to these requirements, see "Technical Proposal Instructions, Section D" below.

Security

- CMS should support installation on cloud hosting environments.
- The CMS must be secure. The system should have customizable, granular privileges that an administrator could make as loose or as tight as possible.
- The system should record an audit trail, which allows an administrator to see what changes have been made to pages of the site. It also should support versioning of files.
- The CMS should include support for LDAP, ActiveDirectory integration functionality.
- The CMS should include a form of sandbox area or staging environment.
- If there is an update or new feature available for your CMS, how is that communicated? What are the options for support in implementing an update?
- Proposers should complete the HECVAT Lite document included as Appendix C.

Ease of Use

- The system should offer a What You See Is What You Get (WYSIWYG) interface. This means authors will be able to edit content in an interface, which allows the content to appear similar to what will post on the Web. The system should offer spelling and accessibility checks by authors.
- The CMS should allow for in-context editing. This function will allow users to browse live pages on the site and edit it directly from that point.
- The system should allow for Code View editing.
- It is also important for the CMS to be SEO friendly by allowing tasks such as metadata creation and writing user-friendly URLs.
- Simple installation, configuration and maintenance are necessary.
- The CMS should offer page design options and templates.

Management

- The CMS must offer migration of existing content into the CMS.
- The system should offer a content scheduling feature so users can schedule their content to automatically go live at a certain date and time.
- The system needs to accommodate various content types, including but not limited to, HTML, plain text, PDF, XML, images, video, and audio.
- The CMS should support email notifications to content authors for outdated and stale content alerts.
- A workflow/governance process allowing content distribution separate from those granted publishing rights is needed.
- The CMS must provide an easy solution for administrators to contact editors.

Interoperability

- The CMS must follow guidelines for Section 508/WCAG 2.0 Level AA compliance for templates and validation of editor-added content. Systems should validate that images have a descriptive alternative text tag relevant to the page.
- Content Syndication via RSS is another aspect of Interoperability. This is now expected on most university sites. It will provide an additional mechanism to communicate with our target audiences and potentially bring them back to our website.

Flexibility

- The CMS system should support multiple sites under a single license. We have a number of subdomains that may need to run over a single CMS.
- The CMS should support social media sharing.
- PUSH-style CMS is needed.

Built-in Applications

- The system must include integrated search.
- The CMS should facilitate the creation and management of marketing campaigns. (optional)
- The CMS must contain analytics for reporting page/content items viewed, number of users per time period, and so forth, with real-time access for approved users.
 - This includes integration with existing analytics platforms such as Google Analytics.

Hosting

- The system should provide an option for cloud hosting of the CMS environment.
 - Production web server hosting (cloud) is not a mandatory part of the RFP, but if services are available, please provide additional information and pricing details.

Staging Server/Sandbox

- The system should provide the opportunity to implement a staging server or sandbox environment.
 - Detail costs associated with the implementation of this environment.

Professional Services

- The proposer should provide additional information related to professional services offered in addition to the CMS product. Services such as, but not limited to, content migration, technology/development, consultation, training, etc. will be considered.

General Requirements

Purpose

The purpose of this RFP is to establish a contract (or contracts) for website content management system services for Troy University. The categories of service requirements are contained in the "Scope of Services" and "Phase I: Technical Proposal" sections.

Professional Expectations

Proposers interested in presenting proposals must demonstrate substantial experience and expertise in the development and implementation of services. If there are any conflicts of interest, including performance of strategic level work for a competitor of Troy University, or if there are any potential barriers to complete the performance of this project, the vendor must disclose these issues in the response to this RFP.

In addition, all proposers must agree to the following terms and be willing to provide the following services upon successful completion of RFP and subsequent contract award:

- The proposer(s) will be part of the team, and act at all times in ways that help TROY achieve its strategic goals and objectives.
- The proposer(s) will provide assistance to TROY in analysis, research, planning and implementation for all projects and activities undertaken within the scope of the contract.
- Proposer(s) will provide competent and experienced staff, dedicated to the TROY account, as needed to develop and maintain a positive, productive relationship and to meet all agreed upon timelines.
- If requested, proposer personnel shall be available to timely attend planning, implementation and other meetings as reasonably requested during the term of the contract.
- To facilitate transition, the proposer(s) shall, at no cost to TROY, attend start-up meetings with appropriate TROY representatives. These meetings will address TROY's expectations, timelines and transition / migration of websites. If the proposer is not located within a three-hour drive of TROY's main campus in Troy, Ala., the proposer should be able to participate in video-conferencing with the TROY representatives throughout the contract term.

- The proposer(s) will provide input, expertise and guidance to assist in the development of strategies related to website CMS services and will work closely at all times with the Marketing and Communication, Information Technology and other relevant TROY team members, which may include various personnel or other officers as appropriate.
- Proposer(s) will work with TROY to identify strategic issues for the specific area for which it is proposing that may arise, perform relevant work to study the issues and recommend actions in response of findings.
- All research and associated results will be the property of TROY and cannot be shared without express prior written consent of a TROY official.
- All brand imagery, designs, and digital representations created while under contract will become property of TROY. All original ideas, innovations and patents created while under contract will become property of TROY.
- All results or conclusions found during this project will remain confidential unless specific written approval of a TROY official is provided.
- Proposer(s) will provide website CMS and/or expert services as assigned. The proposer(s) may be requested to acquire related services with third parties on behalf of TROY. With written, advanced approval of a cost estimate, these acquisitions may be reimbursed to the proposer. A mark-up or commission may or may not be allowed depending on the circumstances.
- All copy, design, photography, videography, audio-visuals, artwork, graphics, templates and source code exclusively prepared or developed for TROY will become the sole property of the University.
- Original, native layered art files and source code are to be provided upon request. TROY reserves the right to edit/adapt originals as needed.
- Proposer(s) may be asked to secure stock photographs, illustrations or code elements needed to execute design concepts.
- Any and all technology updates over the life of the contract, including any renewal options, are considered to be a requirement of this contract and are expected to be included at no additional cost to the University unless negotiated in advance.
- TROY is a nonprofit educational institution and is eligible for discount pricing and tax exemption. The proposer must also directly pay all third-party sourced invoices and submit these expenses monthly to TROY for reimbursement. TROY will provide its proposer with a copy of its sales tax exemption certificate.

Commitment of the University

Troy University (TROY) reserves the right to withdraw this RFP at any time and for any reason. Receipt of proposal materials by the University or submission of a proposal to the University confers no rights upon the proposer nor obligates the University in any manner.

A contract or contracts, based on this RFP, may or may not be awarded. Any contract resulting in an award from the RFP is invalid until properly approved and executed by the Chancellor or approved designee on behalf of Troy University. Any agreements shall be construed and interpreted according to the laws of the State of Alabama. This RFP may result in multiple awards, should the University deem it best to multi-award.

Issuing Office

This RFP is being issued by and sealed proposals are to be submitted to:

Troy University
Mrs. Jessica Hasson
Purchasing and Asset Management
211 Wright Hall
Troy, AL 36082
Attention: Website Content Management System RFP18-025

Offer of Gratuities

By submission of a proposal, the proposer certifies that no official or employee of the University has or will benefit financially or materially from this contract. The contract may be terminated by the University if it is determined that gratuities of any kind were either offered to, or received by, any official or employee of the University from the potential proposer, his agent, or employees.

Restrictions on Communicating with University Staff

From the issue date of the RFP, until a proposer(s) is(are) selected and selection(s) is(are) announced, proposers are not allowed to communicate with any University staff except:

1. Donna Clark Schubert or her designee at the following email address: marketing@troy.edu
2. The Purchasing and Asset Management department: bids@troy.edu
3. University Representatives during oral presentations and demonstrations

The University shall reserve the right to reject a proposal for violation of this provision.

Oral Commitments

Potential proposers should clearly understand that any verbal representations made or assumed to be made during any oral discussions held between representatives of potential proposers and any Troy University personnel are not binding on Troy University, unless confirmed in writing by the Purchasing Department.

Proposers shall be accorded fair and equal treatment with respect to any opportunity for discussion, negotiation, and clarification of proposals. Any oral clarifications of substance shall be produced in writing by the proposer when requested by TROY.

RFP Interpretations

Any such requests for interpretation or correction must be received by March 28, 2018, 4:00 pm CDT in order to be given consideration. All interpretation requests will be addressed during the mandatory pre-proposal conference on March 29, 2018, 2:00pmCDT.

Every request for such interpretation or correction shall be addressed in writing to:

Troy University
Ms. Jessica Hasson, Purchasing and Asset Management
211 Wright Hall
Troy, AL 36082
Attention: Website Content Management System RFP 18-025

For website content management system clarifications, questions should be submitted both to marketing@troy.edu and bids@troy.edu. All questions are due by March 28, 2018, 4:00 pm CDT.

RFP Addenda

Addenda to this RFP may be necessary prior to the closing date and will be furnished by mail or email to all prospective proposers. Failure to acknowledge receipt of addenda in accordance with instructions contained in the addendum may result in the proposal not being considered.

Confidentiality and Proprietary Information

During this RFP, proposer and the University may have access to certain confidential and proprietary materials of each other. Neither the University nor proposer shall disclose any of the other party's confidential or proprietary information, directly or indirectly, during or after the term of this RFP. The parties shall not photocopy or otherwise duplicate any such material without the prior written consent of the originator. All confidential and other proprietary information shall remain the exclusive property of its originator and shall be returned thereto immediately upon request. In the event of any breach of this provision, the offended party shall be entitled to equitable relief, including an injunction or specific performance, in addition to all other remedies otherwise available. This provision shall survive the completion of this RFP. Upon request by TROY, proposers may be required to sign a non-disclosure agreement.

Litigation Clause

This Agreement shall be governed by the laws of the State of Alabama both as to its interpretation and performance without regard to its choice of law requirements. Should either party be required to legally enforce this agreement then suit shall be filed in the Circuit Court of Pike County, Alabama as the exclusive venue to adjudicate the same and the non-prevailing party shall be responsible for the expenses of the prevailing party, including reasonable attorney's fees as a result of such litigation.

Requirements for Phase I

Technical Proposal and Price Proposal

All proposers responding to this RFP will be required to submit a Technical Proposal and a Price Proposal to be considered. See Appendix A for the Technical Proposal Transmittal Form and Appendix B for the sample Price Proposal.

Examination of RFP Document

The proposer is encouraged to carefully examine all related RFP documents to become fully informed. The proposer is responsible for collecting all necessary data required for developing its proposal for the described services.

Mandatory Pre-proposal Conference

A pre-proposal conference will be held on the date shown in the Calendar of Events at Troy University, Troy, Ala. Attendance at the pre-proposal conference is mandatory. The proposer may either attend in person or via WebEx. Each proposer is limited to two (2) representatives per vendor regardless of the method of attendance. The University must be informed by the date shown in the Calendar of Events of the manner in which the proposer will attend. For those attending in person, the time and location on campus will be provided at a later date.

Submissions

Proposer must submit six hardcopy original documents and a flash drive that contains the proposal. The flash drive and original documents will become the property of TROY.

Sealed proposals will be received until the date shown on the Calendar of Events at which time bids will be opened publicly. Proposals received after the date and time specified will not be accepted.

Sealed Proposals should be either mailed or delivered to:

Troy University
Ms. Jessica Hasson, Purchasing and Asset Management
211 Wright Hall
Troy, AL 36082

The outside cover should be clearly marked as:

Proposal for Website Content Management System
RFP 18-025
Name of Company
Date/Time

Proposal Addenda and Rule for Withdrawal

Prior to the deadline date specified for receipt of Phase I, a proposal may be withdrawn by submitting a written request for its withdrawal to the address listed above.

Unless requested by the University, the University will not accept any addenda, revisions, or alterations to proposals after the Phase I due date.

Any submitted proposal shall remain valid for six (6) months after the Phase I due date.

Rejection of Non-Responsive Proposals

Proposals shall be considered non-responsive if they contain omissions, alterations of unacceptable conditions or limitations, or other irregularities of any kind. TROY may reject proposals considered non-responsive.

Additional Requirements for Category 1

The proposer(s) may bid on Category 1, Category 2 or both categories of services outlined in the Scope of Services. In addition to the requirements of all proposers, those submitting proposals in Category 1 must provide this additional service:

- Dedicated account management: TROY expects that personnel assigned to its account management team will serve diligently throughout the term of the contract. Each member of the account team shall be assigned for at least a twelve-month period, unless TROY should request the replacement of a member or a member leaves the proposer's employment. Any changes to the account team must be discussed with and any proposed replacements must be approved in writing by TROY via a contract amendment.

Requirements for Phase II

Oral Presentation/Demonstration and Price Discussion

Selected proposers will be required to make a presentation/demonstration of their proposal as well as offer clarification of their price proposal. Only those proposers selected by Troy University will be invited to present.

Bid Bond

Troy University Purchasing Policy provides that all proposers are required to furnish a bid bond on any contracts for services exceeding \$50,000. A bid bond is designed to secure a particular bid until it is either rejected or accepted and a contract is made and secured or goods are received.

Bid guarantees may be presented in the form of a bid bond, postal money order, certified check, cashier's check, or irrevocable letter of credit for no less than 10% of the bid amount. All check guarantees for unsuccessful proposers will be returned in a timely manner.

For the successful proposer, a bid bond remains in effect until the following:

- A proposer who is providing goods or materials has received an approved Troy University Purchase Order or contract, or

- A proposer who is providing services has been notified of award. The bid bond for the successful proposer will remain in the possession of the Troy University Purchasing Department until such time as a performance bond can be presented to the University for the services under contract.

Requirements for RFP Awards

Execution of Contract

The proposer(s) to whom the contract(s) is(are) awarded shall, within ten (10) days after prescribed documents are presented for signature, execute and deliver to TROY the contract in substantial form, and include those items added or deleted during negotiations. The proposer shall also provide satisfactory evidence of all required insurance coverage, bonds, and proof, satisfactory to TROY, of the authority of the person executing the contract on behalf of the proposer.

The above documents must be furnished, executed, and delivered before the contract will be executed by TROY. The contract will not be binding upon TROY until it has been executed by TROY and a copy of such fully executed contract is deliverable to the proposer. The contract shall be for a term of one year with an option or options for renewal for a period not to exceed a cumulative total of five years, at the sole discretion of TROY.

Form of Contract

The successful proposer(s) shall submit a proposed agreement(s), the scope and terms of the contract shall consist of the RFP, any amendments thereto, and the vendor's proposal in response to the RFP. In the event that an issue is addressed in one document that is not addressed in the other documents, no conflict in language shall be deemed to have occurred. However, the University reserves the right to clarify any contractual relationship in writing with the concurrence of the proposer, and such written clarification shall govern in case of conflict with the applicable requirements stated in the RFP or the proposal. In all other matters not affected by the written clarification, if any, the RFP shall govern.

No modifications or changes in any provision in the contract shall be made, or construed to have been made, unless such modification is mutually agreed to, in writing, by the proposer and the University and incorporated as a written amendment to the contract. Memoranda of understanding and correspondence shall not be construed as amendments to the contract.

The contract shall be construed according to the laws of the State of Alabama. Any legal proceedings against the University regarding this RFP, or any resultant contract, shall be brought in the State of Alabama, administrative or judicial.

Deviations from the Form of Contract

Stated requirements appearing elsewhere in the RFP shall become a part of the terms and conditions of any resulting contract. Any deviations, therefore, must be specifically defined by the proposer in the proposal which, if successful, shall become part of the contract, but such deviations must not be in conflict with the basic nature of this RFP.

Performance Bond

Alabama Law (Section 41-16-28, Code of Alabama 1975) provides that a bond is a responsible sum for faithful performance of the contract, with adequate surety, shall be required in an amount specified in the advertisement for bids. The performance bond shall be set at no less than 10% of the total contractual amount or at a stated amount of no less than the cost of one month's service, whichever is greater. A performance bond must be in effect prior to the first date of service. Upon award of the bid, the successful proposer will be responsible for providing a Performance Bond, which should be valid until all work associated with this project has been completed. The performance bond should be presented to the Troy University Purchasing Department before a purchase order is issued. No goods are to be delivered and no work is to begin without an official Troy University purchase

Disclosure Forms

State of Alabama Act 2001-955 requires that the Proposer Disclosure statement be completed and filed with all proposals, bids, contracts or grant proposals to the State of Alabama in excess of \$5,000.00. A proposer disclosure statement is not required for contracts for gas, water, and electric services, where no competition exists, or where rates are fixed by law or ordinance. In circumstances where a contract is awarded by competitive bid, the disclosure statement shall be required only from the person receiving the contract and shall be submitted within ten (10) days of the award. A new proposer disclosure statement is required for each purchase in excess of \$5,000.00 regardless of prior purchases. A current proposer disclosure statement must be on file before invoices can be processed for payment.

Compliance with the Law

Proposer shall comply with all applicable laws, ordinances, rules and regulations relating to the Services provided under this Agreement.

Alabama Immigration law (Alabama Law (Section 31-13-9 (a) and (b), Code of Alabama, 1975))

The State of Alabama passed new legislation effective January 1, 2012 known as the Beason-Hammon Alabama Taxpayer and Citizen Protection Act, Act No. 2011-535. This legislation requires anyone receiving state monies to verify that they are in compliance with the new immigration law. State Agencies, including Troy University are required to withhold payment until proper verification has been obtained.

Section 508 law

In 1998, Congress amended the Rehabilitation Act of 1973 to require Federal agencies to make their electronic and information technology (EIT) accessible to people with disabilities. Inaccessible technology interferes with an ability to obtain and use information quickly and easily. Section 508 was enacted to eliminate barriers in information technology, open new opportunities for people with disabilities, and encourage development of technologies that will help achieve these goals. The law applies to all Federal agencies when they develop, procure, maintain, or use electronic and information technology. Under Section 508 (29 U.S.C. 794 d), agencies must give disabled employees and members of the public access to information that is comparable to access available to others. It is recommended that you review the laws and regulations under this section to further your understanding about Section 508 requirements and how you can support implementation.

Insolvency

In addition to all other rights herein, either party hereto may terminate this agreement without prior notice should the other party become insolvent, voluntarily file for bankruptcy or receivership, or make any assignment for the benefit of creditors, or should the other party have commenced against it any proceeding, suit or action in bankruptcy or receivership provided such proceeding, suit or action is not dismissed within thirty (30) days.

TROY's financial status depends directly upon appropriations from the state of Alabama. Therefore, this agreement, and its continuation, is hereby expressly made contingent upon TROY actually receiving from the state of Alabama an appropriation in sufficient amount so as to allow TROY to meet its financial obligations. Such determination shall be made solely by TROY and such determination shall be final and binding upon both parties. If at any time TROY shall determine that its appropriation is not adequate to allow it to meet its obligations, then in such event TROY shall be allowed to terminate this Agreement, upon 90 days written notice to proposer, with all other termination and final settlement provisions remaining applicable hereto.

Insurance

Awarded vendors are to provide a copy of a Certificate of Insurance verifying your vendor's coverage for Commercial General Liability, Workers' Compensation, and Professional Liability Insurance.

Confidentiality and Proprietary Information

During the term of this agreement, proposer and the University may have access to certain confidential and proprietary materials of each other. Neither the University nor proposer shall disclose any of the other party's confidential or proprietary information, directly or indirectly, during or after the term of this agreement. The parties shall not photocopy or otherwise duplicate any such material without the prior written consent of the originator. All confidential and other proprietary information shall remain the exclusive property of its originator and shall be returned thereto immediately upon termination of this agreement. In the event of any breach of this provision, the offended party shall be entitled to equitable relief, including an injunction or specific performance, in addition to all other remedies otherwise available. This provision shall survive termination of this agreement. Upon request by TROY, proposers may be required to sign a non-disclosure agreement.

As a reminder, certain student data must be protected under the provisions of FERPA (Family Educational Rights and Privacy Act) and the Gramm-Leach-Bliley Act. The selected vendor or vendors must have administrative, technical and physical safeguards to protect the security, confidentiality and integrity of the University's confidential information.

Assignment

This agreement, or any portion thereof, may not be assigned by either party without the written consent of the other.

Catastrophe

Neither proposer nor TROY shall be liable for failure to perform its respective obligations hereunder when such failure is caused by fire, explosion, water, act of God, civil disorder or disturbance, strikes, vandalism, war, sabotage, weather and energy related closings, governmental rules or regulations, failure of third parties to

perform their obligations with respect to the services, or like causes beyond the reasonable control of such party, or for real or personal property destroyed or damaged due to such causes.

Severability

If any term or provision of this agreement or the application hereof to any person or circumstance shall, to any extent or for any reason be invalid or unenforceable, the remainder of this agreement and the application of such term or provision to any person or circumstance other than those as to which it is held invalid or unenforceable shall not be affected thereby, and each remaining term and provision of this agreement shall be valid and enforceable to the fullest extent permitted by law.

Amendments to Agreement

All provisions of this agreement shall remain in effect throughout the term hereof unless the parties agree, in a written document signed by both parties, to amend, add or delete any provision. This agreement contains all agreements of the parties with respect to matters covered herein, superseding any prior agreements and may not be changed other than by an agreement in writing signed by the parties hereto.

Entire Agreement

This agreement and its attachments and other documents specifically incorporated by reference herein contains the entire understanding and agreement of the parties concerning the matters contained herein, and supersedes and replaces any prior or contemporaneous oral or written contracts or communications concerning the matters contained herein.

Phase I: Technical Proposal and Price Proposal Instructions

All proposers responding to this RFP will be required to submit a Technical Proposal and a Price Proposal by the due date shown in the Calendar of Events. See Appendix A for the Technical Proposal Transmittal Form and Appendix B for the sample Price Proposal.

Technical Proposal Instructions

Proposals shall be submitted in the format contained in the Request for Proposal. This material must be in sequence and related to the Request for Proposal. The University will make no reimbursement for the cost of developing or presenting proposals in response to this request. Only information specifically related to this type of project will be evaluated. Proposals must present the following information in the sequence shown.

Cover Sheet: Technical Proposal Submission Form (Appendix A)

Section A: Vendor Philosophy, Culture, and Approach (Maximum Length 3-4 Pages)

TROY is seeking partners who will contribute both strategically and tactically to TROY web efforts via the implementation of a content management system. Teamwork, collaboration, and a “can-do” attitude will be important to TROY. TROY seeks to engage a partner(s) who will be part of accelerating our growth and creating a rich digital/online experience. TROY seeks to be at the forefront of transforming higher education, and is seeking partners who enthusiastically share the vision and will demonstrate it in high quality work on a daily basis.

In Section A, provide an executive summary narrative that addresses how you plan to partner strategically and tactically with TROY; describe your philosophy and culture; and describe how you align your philosophy and culture with a client’s philosophy, culture, vision and strategies.

The narrative should explain how the vendor intends to provide the required services throughout the term of the contract. The vendor should close with a summary of any problems which might be expected and proposed solutions to those anticipated problems.

The vendor should demonstrate that it understands both the magnitude and the importance of the requirements by detailing the proposed products and/or services being offered to the University.

Section B: Vendor Profile and Experience

a. Vendor Details: Provide the following:

1. Description of your relevant qualifications to perform the requested and offered services.
2. Provide a minimum of three higher education references.
3. Vendor overview, corporate background, mission statement, and/or philosophy (if not already detailed in Section A);
4. Primary business focus or specialty;
5. Headquarters location;
6. Number of years your company has been in business;
7. Length of experience in providing web and/or digital content management services;

8. Size of company and number of employees by job classification;
9. Gross billings of the vendor for the last five (5) years;
10. List of top ten (10) clients by billings
11. Competitive research capabilities; and,
12. Any other notable facts that may demonstrate your unique qualifications and aid in the selection process.
13. TROY may, at its sole discretion, request Financial Statements of the shortlisted vendors so that the proposer's financial stability and capacity may be evaluated by TROY prior to the award decision.

b. Work for other institutions of higher education

The proposer is to describe its current work for other higher education institutions, as well as its work for higher education institutions conducted in the previous two years. In addition, please provide a list of all higher education institutions you are working with currently (including project nature/status, link to live websites if applicable).

c. Sample Contracts

The proposer is to provide three (3) contracts on which he/she deems the most similar or relevant to the TROY requirements and the services being offered. Use client and short case studies to illustrate performance examples for the specific services being offered. These contracts should be of similar size, scope and complexity to Troy University.

The following are to be provided:

1. Client name, address, contact person and telephone number including area code and extension of contact person;
2. A brief, but informative description of the web and/or digital content management effort provided including the specific services provided;
3. The dollar volume for the contract/project;
4. The name of your Account Manager assigned to this contract;
5. The term of the contract (start date and completion date); if ongoing, please state as such; and
6. Similarities to the TROY contract as described in this RFP.

d. Vendor References

Only the selected proposers for phase II will have their references contacted. However, all vendors responding must supply a minimum of three references. The University intends to check references of the above contracts/projects of those proposers who remain eligible for award following the Oral Presentation and Price Discussion sessions. The University reserves the right to verify all information given if it so chooses, as well as, to check any other sources available including itself even if not provided as a reference by the proposer. References will be held in the strictest of confidence. Such references are to be from different contracts; that is, only one reference per contract is allowed.

Section C: Key Personnel/Staffing Qualifications/References

a. Personnel Details

Vendors are to present a plan for the management and staffing of the web and digital content management services being offered to the University. The Plan shall delineate between full-time and part-time employees, as well as, associated schedules and labor hours.

If the vendor has multiple locations, TROY is primarily interested in the capabilities and experience of the office and specific individuals who will provide the majority of the required services to TROY. Unless specifically otherwise stated, all requested information about the proposers should be limited to the local office and the individuals that will serve TROY. The response should also include details of the expected interaction with TROY's Offices of Marketing and Communication and Information Technology.

Provide an organizational chart showing the management structure of the vendor with a description of the qualifications, credentials and the location of upper level management and regional management support staff, as well as, those actually assigned and dedicated to manage this account. Information to be included is the following: (i) Key Personnel's Names, Titles, and Roles; (ii) Area of expertise; (iii) Geographical Location; and (iv) Brief description of qualifications and credentials.

b. Key Personnel Resumes

Vendors should provide a brief, but informative resume or curriculum vitae for the person(s) recommend as the Executive-in-Charge and the Account Manager under this contract.

The resume of each person should include the following:

1. Educational history, applicable training received, certifications earned, including dates of attendance, dates of certifications earned;
2. Employment history, including dates of employment (start and ending dates) and positions held and dates applicable for each of these positions;
3. Experience on similar contracts, both with your company and other vendors. Give a brief description of the web services project/contract. Also, indicate the role the person performed for the project/contract (i.e. Executive-in-Charge, Account Manager, etc.)
4. References: Provide three (3) contract/client references on the proposed Account Manager inclusive of contact person, and phone number. Such references are to be contract references not employment references. It is important that such references can speak to the performance of the person in the role to be assigned for the services being offered to the University.
5. Selected proposer(s) will have the references of their Key Personnel contacted. However, all vendors responding must supply this information within their Technical Proposals. The University intends to check references of the Key Personnel for the contracts/projects provided of those proposers who remain susceptible of the award following the Oral Presentation and Price Discussion sessions. Please be sure that

accurate information is provided and that the contact person is capable of speaking to your company's capability in performing the services required. References will be held in the strictest of confidence. In addition, the University reserves the right to check other sources available, including internal resources, if not provided as such by the proposer. Such references are to be from different contracts; that is, only one reference per contract is allowed.

NOTE: Personnel Commitment: By submitting the name of the Executive-in-Charge and the Account Manager and other Key People for consideration, the proposer is committing this(ese) individual(s) to TROY for this contract, if awarded. No personnel changes will be permitted without written authorization from the University.

c. Back-up Plan

Vendors are to describe how the University will be serviced in the absence of the Account Manager due to vacations, sickness, business trips, etc.

❑ Section D: Additional Project Related Information

- Implementation Requirements
 - Since this RFP is part of an ongoing comprehensive site redesign, it is critical that you clearly and accurately convey your approach to / capacity for back-end implementation of front-end site files as delivered by our front-end design partner. Those site files will include front-end mockups (HTML, CSS, JavaScript) of the following page layouts:
 - Home page
 - Standard interior page
 - Program listing / filter page (with cross-filtering functionality and active program search functionality)
 - Gateway page
 - News listing page
 - News story page
 - Microsite home (for academic units)
 - Microsite standard interior (for academic units)
 - Explain any front-end parameters to which you expect our design agency to adhere as they are completing front-end development of site files.
 - Detail your costs for back-end implementation and content migration services, along with any assumptions underlying those costs.
- Technical Requirements
 - List the Operating Systems (OS) supported by the CMS.
 - List the databases that the CMS supports.
 - Do the computers used by authors require any software to be installed beyond a standard web browser?
 - Is your CMS interface 100% responsive?
 - Do you offer a Cloud Subscription version of the CMS?
- Technical Support
 - Describe the process to file bugs and trouble tickets.

- Do you charge extra for support tiers?
- How many support contacts can one customer have? Can additional contacts be purchased?
- Describe the technical resources available to customers (Ex. Guides, documentation, training videos, conferences, etc.).
- How are technical support issues escalated and resolved? Describe the typical resolution process.
- Content Management
 - Describe how content is entered or submitted using your CMS, as well as the skill set required to update existing content.
 - Does your standard text editor allow users to directly edit HTML code?
 - Explain how your CMS allows "rich content", such as images, videos, audio, in pages.
 - Does your CMS provide in-context editing? If yes:
 - Does it only apply to the WYSIWYG Editor or also to other types of fields, such as text fields, image choosers, blocks of content, etc.?
 - Describe the process to set up in-context editing from an administrator's point of view.
 - Explain how your CMS accommodates publishing start and end dates for content.
 - Does your system provide content contributors the ability to view stale content?
 - Does your system provide content contributors the ability to set review dates for their content assets?
 - Does the system provide content managers the ability to send email notification to contributors to alert them of outdated content?
 - Explain in detail how your CMS accommodates various content types, including HTML, text, PDF, XML, images, or audio. List the file types that are natively supported and explain how these files are stored and managed.
 - Is the system able to automatically generate thumbnails of larger images?
 - Does your CMS offer users the ability to crop/resize/optimize images directly in the system?
 - Is your system able to automatically generate navigation and other menu items, such as breadcrumbs, based on directory content? Can the order of navigation be easily rearranged?
 - Does your product provide the capability to export/copy content elements from one page for use on another page or on a different site?
 - Describe the ways in which your system facilitates content re-use.
 - Does your product fully support HTML5?
 - How many user licenses/seats are available? Can additional licenses/seats be purchased?
- Interactive and Social Content
 - Describe how your CMS integrates with social media products such as Facebook, YouTube, Instagram, Twitter, etc.
 - Describe how your system supports the promotion of new content.
 - RSS feeds, utilization of content across the site, social integration, etc.
 - If functionality is available, describe how your system supports email campaigns.

- Can you track, measure, and manage unlimited campaigns?
- Search Engine Optimization
 - Describe the ways in which your system facilitates and enhances SEO.
- Additional Functionality
 - What other modules or functional components does your product provide? Do they cost extra?
 - Describe your product's ability to import feeds from other providers.
 - Does your product facilitate the implementation of course catalogs?
 - Does your product facilitate the implementation of campus calendars?
 - Do these calendars integrate with external event management systems?
 - Does your product facilitate the implementation of faculty profiles?
 - Does your product facilitate the implementation of newsrooms?
 - Does your product offer a Web Services API? Describe.
 - Describe which options you provide to migrate existing content into your CMS.
- Analytics
 - Describe the analytics tools with which your CMS integrates.
 - Does your CMS have the ability to A/B test content and provide relevant statistics?
 - Does your tool provide a way to integrate with social analytics platforms?
 - Describe the analytics reports that your system provides.
- Mobile
 - Explain how your system facilitates Responsive Web Design.
 - Provide example of current (major) customer implementations of mobile sites and/or Responsive Web Design.
- Workflow Management
 - Explain what types of workflows your CMS supports (out of the box, custom).
 - Describe the granularity of workflows. How many different workflows are allowed and how are they assigned?
 - Explain the process of applying a workflow.
 - Describe your approval workflow that will allow for multi-step approval by different departments.
 - Describe how users are notified of workflow assignments.
 - Describe the publishing process to a live site upon approval.
 - Describe how your product supports workflow for out-of-date and expired content.
- Publishing
 - Explain if/how your product supports publishing multiple sub-sets of the same site, as well as multiple sites.
 - Describe how the publishing of content can be scheduled.
 - Describe if/how a single piece of content can be scheduled to appear in different places on one or more sites, and for different amounts of time.
 - Can content be published on an ad hoc basis by different users and groups?
- Search
 - Describe the search functionality provided by your product for searching content on the published site.

- Does your product integrate with any of the most prominent search engines?
 - What search capabilities does the system provide for finding content within the CMS?
- Quality Control
 - Does your system include licenses for testing, development, and stand-by?
 - If so, can you easily migrate content from one CMS instance to another?
 - Explain the process of creating, testing, and staging content.
 - Does your product have a built-in spell checker?
 - Can the system identify broken or problem links? If so, please describe.
 - Does your system provide tools to facilitate content audits?
 - Explain how your product ensures Section 508 Compliance. Do you have a mechanism for ongoing compliance monitoring, reporting and/or remediation?
 - How can users of your product revert content back out to prior versions when needed?
 - How many previous versions of a content asset does the system keep?
 - Explain how your system provides users with tools to validate content (e.g. required fields, allowable content types).
 - Describe the process of restoring a previously deleted asset.
 - Does your product support the ability to check-in/check-out content in order to prevent overwrites?
- User Management and System Administration
 - Can your product authenticate user identity via LDAP, ActiveDirectory, etc.?
 - Describe the typical process of installation and configuration, including the amount of time required, and the skill sets and training required for system administrators to perform a system installation and maintenance.
 - Describe the process for database back-ups and restores.
 - Describe how accounts and access rights are created and managed for use within the system.
 - Does the system allow administrators to create custom roles?
 - Does your system allow users to have different roles for different sites?
- Flexibility and Scalability
 - Which scripting language(s) does your CMS support?
 - Which transformation language (XSLT or Velocity) does your CMS support?
 - How many websites can be managed in one instance of your CMS?
 - Describe the process of sharing content assets between multiple sites.
 - Explain the process of inserting data from third party applications into content managed within your CMS?
 - What common third-party tools integrate well with your CMS?
 - Explain how/if multi-lingual sites can be implemented in your system and what options are available.
 - Provide examples of live websites.
 - Does your product support load balanced servers and clustered servers?
- Content Migration
 - Describe the processes involved to migrate existing web content into your CMS and provide pricing options.
- Hosting – Cloud

- Does your company offer a hosted or SaaS version of the CMS?
- Describe the technical specifications of your hosted environment.
- What are the technical support services included in hosting?
- Describe the process of upgrading to newer versions of the product in a hosted environment.
- Describe the process of moving from an installed instance to a hosted instance and vice versa.
- Does your company provide production web server hosting? If so, please provide additional details.
- Training
 - Describe the training options available to technical users of the system.
 - Describe the training options available to content contributors/end users.
 - Describe any other training resources that you provide.
 - Do you provide advice or assistance for best practices in setting up the initial installation, configuration, and user provisioning?
 - Is training available on-site or remotely?
 - Provide pricing information related to training options.
- Professional Services
 - Describe the professional services offered by your company as they relate to CMS integrations, special projects, content migration, and consulting.
 - Do you have a project portfolio that you can provide?
- Timeline
 - With the mandated launch deadline of Fall 2018, provide a general timeline for the implementation of services. See notes above regarding the project timeline as it relates to when front-end files will be delivered by our design agency for CMS implementation.
- Language Capabilities
 - Describe if/how your system supports the implementation of multi-lingual content.
- GDPR
 - TROY is an international university with a global reach. The CMS provider should demonstrate awareness of and compliance with EU's GDPR standards.
- Miscellaneous Questions
 - Approximately how many higher education websites are powered by your CMS?
 - What is the approximate number of higher education websites in our region (South East) powered by your CMS?
 - Provide a list (including URLs) of current higher education implementations.
 - Describe the resources provided by and for your user community.
 - Describe how your system supports content strategy.
 - How do you work with vendors who are creating the front-end files that include CSS, HTML and JavaScript? Do you only conduct a handoff to review the work? Do you provide assistance before handoff to help answer questions specific to your CMS? Do you require the use of certain tools to check the front-end work before you begin implantation? If yes, do you provide access to those tools?

❑ **Section E: HECVAT Lite (Appendix C)**

The University requires the completion of HECVAT Lite documentation to ensure that cloud-based products are appropriately assessed for security and privacy needs. Information related to the HECVAT Lite can be found in Appendix B and should be included with submitted proposals.

❑ **Section F: Acknowledgement of Review of TROY Contract Terms and Conditions**

The proposer is to warrant that they have reviewed all requirements included in this RFP and will execute a contract with these mandatory terms and conditions upon request by TROY, as may be negotiated. Any exceptions to the Contract are to be noted. Proposer is to also acknowledge that TROY is under no obligation to accept such requested exceptions and, as a result of such exceptions, may elect to find the proposer not susceptible of the award(s) of the Contract(s).

❑ **Section G: Disclosure**

If there are any conflicts of interest, including performance of work for a competitor of Troy University, or if there are any potential barriers to complete the performance of this project, the vendor must disclose these issues.

Price Proposal Instructions

The Price Proposal must be submitted with the Technical Proposal. Proposer must submit six hardcopy original documents and a flash drive that contains the proposal. The flash drive and original documents will become the property of TROY.

- a. A sample Price Proposal form is included in Appendix B. In addition to providing a pricing bid as shown in the sample Price Proposal form, alternate pricing structures may also be submitted based on a proposer's unique offerings.
 1. It is anticipated that vendors will provide hourly billing rates (inclusive of all expenses, overhead and profit) for its staff that will be the maximum charged for any project/web services effort done under this contract. The quoted hourly billing rates will be valid for the first year of the contract.
 2. For any work done under the resulting contract, the contractor will provide a quotation using the quoted hourly rates as a maximum for the level of effort applicable to the project for review and approval by the University.
 3. TROY will also reimburse the vendor for the actual cost of pre-approved media, out-sourced creative or other third-party services expenses, travel¹ to focus groups or meetings requested by TROY, etc. on an as needed basis. Vendors will quote a maximum dollar or percent mark-up for subcontractors/outside sources.
 4. Proposed fees and the reimbursed costs shall be exclusive of any taxes for which TROY is exempt, such as the State of Alabama Sales Tax and Federal Excise Taxes. For any work done by subcontractors/outside sources, these will be the maximum percent mark-up allowed. The successful contractor will provide a detailed quotation for any such work done under the contract for review and approval by the University.

¹ Any travel that is reimbursed will be in accordance to the State of Alabama rates in effect at the time the travel is done.

5. It is also possible that TROY may consider a monthly retainer fee quotation if appropriate to the category and subject matter.
6. **Prices for the contract renewal years.** The maximum percent mark-ups for subcontractors and outside contractors and maximum percent commission will remain constant through the life of the contract. The quoted hourly rates must be valid through October 1, 2019.
7. Thereafter, it will be the responsibility of the contractor to request a price increase to the hourly billing rates, if any, by April 1st of each year. Any price increase not received by that time, will not be considered and pricing in the subsequent year will remain as stated during the just completed contract term. A price increase, if any shall not exceed the Consumer Price Index ("CPI") for "All Urban Consumers" as published by the US Department of Labor Statistics. For purposes of calculating the potential increase, the CPI to be used will be the index for twelve-month period ending at the previous calendar year. For example, for September 30, 2017, the price index for twelve-month period ending December 2017 will be used. Statistics will be referenced as a cap for negotiable purposes only. Contractor is not to assume that any price increase will be applied to yearly renewals. As well, increases are not cumulative for prior years; if a contractor fails to request a price increase in one year and then requests an increase for the subsequent year, the contractor cannot include a cumulative amount that includes the prior annual term. Any increase approved by the University will take effect on October 1st of each year.

PHASE II: Oral Presentation and Price Discussion Instructions

Only those proposers selected based on the initial evaluations will be requested to attend an in person Oral Presentation and Price Discussion Session at the University. The due date and time of the Oral Presentation and Price Discussion Session will be set by the University upon completion of the initial proposal evaluation. However, it is anticipated that the presentations will be conducted on the dates shown on the Calendar of Events, so proposers are advised to set these dates aside in their entirety on the key personnel's calendars so as to avoid a conflict. The actual time on these dates will be verified with the applicable proposers at the time presentations are confirmed. The time and date is at the sole discretion of TROY.

The proposed executive-in-charge and the proposed account manager, i.e., the person responsible for the management of the relationship between the proposer and the University for this Contract, must attend the Oral Presentation and Price Discussion Sessions. In addition, the account manager's immediate supervisor is to be present. Any other key individuals who are needed to assist in the description of any part of the services proposed for this RFP are also requested to attend.

At the time the Oral Presentation and Price Discussion Sessions are scheduled, the University will confirm in writing with each proposer the specifics of these sessions inclusive of the topics, time periods, and requested key personnel.

The purposes of the Oral Presentation are as follows:

- to allow the University to meet the proposer's key people and to allow these key people to convey their expertise and applicable experience in the services being offered to the University;
- to discuss/clarify any and all aspects of the Technical Proposal in particular the proposed approach, and staffing to provide the services being offered.;
- to provide an opportunity to clarify the scope of services for this contract;
- to provide the proposer with the opportunity to present a recommended strategy, content management approach for TROY based on knowledge gained through this RFP and proposer's self-directed (self-funded) research completed in coordination of proposal; and
- to review and clarify the Price Proposal structure.

Evaluation Criteria

	Points Possible
Vendor profile, expertise and financial stability	20
Sample contracts indicating likelihood of success / demonstrated history of success	5
Personnel qualifications	15
Vendor experience providing content management services to higher education	10
References	10
Price Proposal	20
Oral Presentation	20
Total	100

Appendix A – Technical Proposal Transmittal Form

TECHNICAL PROPOSAL

RFP 18-025 Website Content Management Services

PROPOSER: _____

Federal Identification Number / Social Security Number: _____

Address: _____

Date: _____

The undersigned hereby submits the Technical Proposal as set forth in RFP18-025

We confirm that this Technical Proposal is based on the Requirements per the RFP and any subsequent addenda.

Our company is submitting a proposal for the following Website Redesign Services functions:

CATEGORIES: (check all that apply)

- 1) Content Management System
 - a) CMS implementation, including back-end implementation of newly designed front-end site files
 - b) CMS hosting
 - Cloud
 - c) Staging server / Sandbox
 - d) Production web server
- 2) Expert Services (project-by-project contract)
 - Content migration
 - Technology / Development
 - Consultation
 - Training
 - Other_____

Appendix B – Sample Price Proposal Form

SAMPLE PRICE PROPOSAL

RFP 18-025 Website Content Management Services

PROPOSER: _____

Federal Identification Number / Social Security Number: _____

Address: _____

Date: _____

The undersigned hereby submits the Sample Price Proposal as set forth in RFP 18-025. We confirm that this Pricing Proposal is based on the Requirements per the RFP and any subsequent addenda.

Having received clarification on all matters upon which any doubt arose, the undersigned proposes to complete the work for the work as described in this RFP and subsequent Addenda as noted above. By signing and submitting this response, undersigned hereby agrees to all the terms and conditions of this RFP including any issued addenda. Proposers are cautioned to verify their final proposals prior to submission, as TROY cannot be responsible for proposer's errors or omissions. Any price proposal that has been accepted by TROY may not be withdrawn by the contractor.

Provide detailed up-front costs for the following:

- A. CMS \$ _____
- B. Implementation \$ _____
- C. Licensing fees \$ _____, timeframe _____

Also provide itemized rates for the following:

- D. Maximum hourly billing rates for all personnel and staff positions \$ _____
- E. Retainer per month (if applicable) \$ _____
- F. Maximum percent (%) mark-up for subcontractors/outside sources: _____ %
- G. Hosting per month (if applicable) \$ _____
- H. Training costs (if applicable) \$ _____
- I. Other costs \$ _____, describe _____
- J. Other costs \$ _____, describe _____
- K. Other costs \$ _____, describe _____
- L. Total project cost \$ _____

We understand by submitting a proposal we are agreeing to all of the terms and conditions included in the RFP documents, and that the Bid / Proposal Affidavit submitted as part of the sample price proposal remains in effect.

In Presence of Witness: _____

Vendor Name: _____

Address: _____

Telephone Number: _____

Signed: _____

Printed Name: _____

Title: _____

Date: _____

Appendix C – HECVAT Lite

EDUCAUSE

Campus IT environments are rapidly changing and the speed of cloud service adoption is increasing. Institutions looking for ways to do more with less see cloud services as a good way to save resources. As campuses deploy or identify cloud services, they must ensure the cloud services are appropriately assessed for managing the risks to the confidentiality, integrity and availability of sensitive institutional information and the PII of constituents.

Many campuses have established a cloud security assessment methodology and resources to review cloud services for privacy and security controls. Other campuses don't have sufficient resources to assess their cloud services in this manner. On the vendor side, many cloud services providers spend significant time responding to the individualized security assessment requests made by campus customers, often answering similar questions repeatedly. Both the provider and consumer of cloud services are wasting precious time creating, responding, and reviewing such assessments.

The Higher Education Cloud Vendor Assessment Tool - Lite attempts to generalize higher education information security and data protection questions and issues for consistency and ease of use. Some institutions may have specific issues that must be addressed in addition to the general questions provided in this assessment. It is anticipated that this Higher Education Cloud Vendor Assessment Tool will be revised over time to account for changes in cloud services provisioning and the information security and data protection needs of higher education institutions.

The Higher Education Cloud Vendor Assessment Tool:

- Helps higher education institutions ensure that cloud services are appropriately assessed for security and privacy needs, including some that are unique to higher education
- Allows a consistent, easily-adopted methodology for campuses wishing to reduce costs through cloud services without increasing risks
- Reduces the burden that cloud service providers face in responding to requests for security assessments from higher education institutions

This Higher Education Cloud Vendor Assessment Tool was created by the Higher Education Information Security Council Shared Assessments Working Group. Its purpose is to provide a starting point for the assessment of third-party provided cloud services and resources. Over time, the Shared Assessments Working Group hopes to create a framework that will establish a community resource where institutions and cloud services providers will share completed Higher Education Cloud Vendor Assessment Tool assessments.

<https://www.educause.edu/hecvat>

<https://www.ren-isac.net/hecvat>

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