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Addendum #1 RFB AA12-JM-4443 Web Site Design Services Vendor Questions & University Responses

Important: All questions and University responses in this addendum must be incorporated in all vendor responses to RFB AA12-JM-4443. Failure to do so may result in the vendor's response being rejected at the sole discretion of the University.

Note: The terms "vendor" and "contractor" are used interchangeably in the answer. They mean the same thing.

- Q1.** Do you have a preference for which major release of Drupal (Drupal 6 or Drupal 7).
- since you mention in the RFP that some of the work being integrated into this project is existing/approved modules it sounds likely that you have an intent to line up the Drupal version with ongoing work at being done at the college.
 - You state extensive use of Video in the RFP including integration with BrightCove - as you may know the state of Video in Drupal 7 is still dismal (although should be sorted out long before your expected project launch)
 - You also point to a reference site (<http://www.umass.edu/foundation/>) which is Drupal 6 based .

A1. The site should be developed in Drupal 6.

Q2. Are their specific goals for Mobile for this project?

- I noticed the use on the foundation reference site that you are using the AdaptiveTheme which is intended to better support mobile devices; although I also see that you have not taken advantage of any of its mobile abilities.
- there is no mention of mobile device use in the RFP

A2. The site should be usable on mobile devices. Mobile users are not being specifically targeted in this site, but we expect the site to be usable by mobile devices.

Q3. Are there restrictions to non-US based firms bidding on this project? It seems unlikely but figured I should ask

A3. Proposals will be considered on a case-by-case basis according to the requirements outlined in the RFP. There is no stated exclusion for non-U.S.-based firms.

Q4. We are assuming Donation giving form will be developed by the client and we will have to integrate it into the proposed site.

- . Will the site have login/Registration feature?
- a. Could you please explain donation scheduling?
- b. Will user be able to post his story (how the stories will be shared) OR only the admin will have right to upload stories on different section of the site.
- c. Could you please elaborate more on campaign priorities? Will these pages be static in nature i.e. Drupal node pages with upload video support? We are bit confused with how 'Student stories' will function.
- d. Our assumption is user will come to the site and add the story which will be displayed on user section after approval of admin.

A4. . No, there are no login or registration requirements

- a. Donation scheduling refers to the ability to create a donation that is made over time. For example, this could be a donation of \$10 each month for the next 12 months. However, please note that the development of the online giving form is not required of the vendor in this project.**
- b. Users will not be able to post content.**
- c. The campaign priority pages will be, as described in the question, Drupal nodes with upload video support.**
- d. This is not correct. Users will not submit content to the site.**

Q5. Regarding "low vision" requirement: will this be incorporated into main design, or be an alternative design available for impaired users?

A5. There are not specific low vision requirements, but the site developer should consider the usability guidelines for Drupal sites presented at: <http://groups.drupal.org/node/39134> in developing the site.

Q6. Will the site be strict 508 compliant? Could you please further define or provide a requirements list?

A6. See the answer to question Q5.

Q7. Regarding "Support all standards-compliant browsers", is there a definitive list available for us to review?

A7. The site should be compatible with these browser and platform combinations:

Safari ver. 3 and above, Mac and Windows

Internet Explorer ver. 7 and above, Windows

Firefox ver. 3 and above, Mac and Windows

Google Chrome ver. 4 and above, Windows, ver. 5 above, Mac

Q8. Regarding giving form:

- a. Is there a list of supported payment gateways?
- b. Is it possible to see a definitive list of requirements for:
 - i. Scheduled payments

ii. End-user payment management

A8. Development of the online giving form will be done in house by UMass Amherst and is not part of the requirements of this RFP.

Q9. Regarding hosting:

a. Are there any server technologies required to be used or integrated with the new Drupal site (caching, performance, etc)?

b. Are the server specifications available for review prior to development?

A9. The site will be developed on the UMass Amherst internal web development server. The vendor will have access to the server during development.

Q10. Regarding video:

a. Please outline which video delivery methods will be supported (CDN, Brightcove, Youtube, local, etc)

A10. UMass Amherst supports Brightcove, YouTube and Vimeo for hosting video. Local support is not available. Brightcove is the primary video service.

Q11. Regarding the UMass installation profile:

a. Is this available for review prior to development

A11. Yes, this will be made available for review prior to development.

Q12. Budget Range:

What is the budget range for this project? Is it possible to know, at this point, what the university's expectations are (in terms of very rough numbers), both for the initial implementation to be launched on October 1 and for any phases of development beyond the launch?

A12. Please submit a proposal with your cost estimate for this project as outlined in section 7.4 of the RFP.

Q13. Giving Form integration:

The RFP mentions a "giving form" that is being implemented in-house by UMass's web-developers. We were hoping for more details on how the giving form will be implemented and whether it might present any special integration requirements (e.g., integration with some kind of web-services back-end, integration with a payment gateway, etc.) that the contractor will need to be aware of during implementation.

A13. The giving form is being developed in-house as a separate site. Integration from the new site to the giving form will consist of links

Q14. Design Comps:

What level of support will UMass need for the design? Will UMass provide mockups, PSDs, and graphics with the expectation that the contractor will implement the design or do they hope to have the contractor provide a design based on the current giving page and foundation pages?

A14. The contractor is responsible for creating the design which will incorporate a limited number of logos and stock images that will be supplied by UMass Amherst.

Q15. Migrating/Importing Content:

Will there be a need to migrate or import content into the site? If so, will there be enough content to warrant a special script or some other automation for importing this content?

Will the content need to be cleaned up (e.g., will there be a need to remove embedded JavaScript and/or CSS from the content before moving it into the new site)?

A15. Migration of content will be a small part of the project. The contractor's work will focus primarily on design and creation of the Drupal theme and site functionality.

Q16. Authentication:

Will users with account access to this site (e.g., administrative users and content editors) need to authenticate against some campus-wide login system (e.g., LDAP or some other SSO system) or will account logins for this Drupal site be new, stand-alone accounts?

A16. Yes, campus users are authenticated against the UMass Amherst LDAP system.

Q17. Are there any existing wireframes or design comps currently built out for this project?

If yes - Are we able to obtain a copy to better gain an idea of the scope of the project?

If no - Should the process of building out the comp be added to the development tasks?

A17. No, there are no wireframes or design comps. This task is part of the work expected from the successful vendor.

Q18. Are there version control preferences? Such as svn, git, etc?

A18. Use of version control is not required for the project. As an option, svn can be used by the vendor while the site is in development.

Q19. Is there a preference to the Drupal 6 or 7 platform? (Please keep in mind some modules are not available in 7 yet.)

A19. See the answer to question question Q1. The UMass Amherst current standard is Drupal 6.

Q20. What is the projected scale? How many page views do you anticipate, number of users, etc?

A20. The main UMass Amherst web site, www.umass.edu receives about 1 million pageviews and 400,000 visits per week during peak time. The new site will receive a small fraction of that amount, perhaps at most 5% of that traffic. There will be approximately 10 authorized users.

Q21. How will payments be processed for online donations? (paypal, google checkout, authorize.net etc?)

A21. Payments for online donations and the development of the online giving form is outside the scope of this RFP. Work on the online giving form is not required by the vendor.

Q22. One question I have is the approximate budget the university has outlined to stick within for this project? Obviously they have some number they would like to keep within.

A22. See the answer to question Q12.

Q23. Are you open to using other solutions besides Drupal? Ruby on Rails being one that I think would work very well here.

A23. The site must be created in Drupal.

Q24. Which payment gateway would you like us to work with?

A24. UMass uses CyberSource. However, work with the payment gateway is outside of the scope of this project. Development of the online giving form and its connection to the payment gateway is being done in house.

Q25. Are the pledge payments reoccurring or one time?

A25. See the answer to question Q24. Development of pledge payment capability is outside the scope of this project.

Q26. What happens to pledges? Is there a follow-up for the pledge? When the money received against a pledge?

A26. See the answer to question Q24. Development of pledge payment capability is outside the scope of this project.

Q27. There is a scope item which says that UMASS will develop the online giving form in house and the vendor will need to integrate the form with the Drupal site. Does it mean that the form will be designed by UMASS developers or does it mean that the form will be separate from rest of the site and will be embedded in the Drupal site?

A27. It means both. The form will be created by UMass and the contractor is required to link to the form from the new site.

Q28. Where will the videos be hosted? On local server or a third party server? If third party server, then which provider?

A28. The videos will be hosted on a third-party server, primarily on Brightcove, but also on YouTube and on Vimeo. See the answer to question Q10.

Q29. Are there specific Search Engine Optimization goals?

A29. There are no stated Search Engine Optimization goals.

Q30. In the 'Scope of Work' section, Home Page:

- a. Support for Video - can you specify the kind of video formats you'd like to support? What platforms do you want video to work on? (iPad, iPhone, Android, all desktop browsers...

A30. Please see the answer to question Q10 for video formats. Please see the answer to question Q7 for browsers. Videos should also play on all iOS devices and on Android.

Q31. Secondary Pages - where you describe the development and design for certain pages, where it says 'including text', do you mean typography and styling, or would you like us to have someone involved with content decisions. (We can do this too, along with usability, but it's at a different rate than design or development.)

A31. The contractor is not expected to be involved in content decisions.

Q32. Secondary Pages, rotating stories: Do you mean a slideshow like that found on the front page of Slate, that has pictures and a story teaser that changes every few seconds?

A32. "Rotating stories" means a series of stories, of which one or more will be featured at any given time and that change over time. This could possibly be displayed in the form of a slideshow.

Q33. Online Giving Form: When you say that you'll be re-developing the online giving form in-house, do you mean that you'll be doing the actual coding, and our job would be to integrate it into the site we're building, or are you giving us new specifications for us to execute in the site?

A33. See the answer to question Q21.

Q34. Can you be more specific about 'Template Designs for future site updates'? Drupal uses many kinds of templates, and asking a Drupal developer for this will melt our brains because we have no idea which templates you mean. Do you mean theme template pages for upcoming layouts? Panels layouts that can be activated and linked to? Something this open ended is difficult to quote. Do you mean an easy to follow project plan that will allow your developers to execute the next stages of a project?

A34. "Template designs" refers to the creation of content types and other site constructs, like modules, that can be used for different types of content on the site.

Q35. What is the most important component that was focused on during the creation of this RFP?

A35. There was no "most important" component focused on during the creation of the RFP.

Q36. Do you favor a local vendor? Or a vendor who has previously worked with UMass?

A36. There is no preference for a local vendor. Vendors with prior experience working with UMass Amherst is listed as one of the minimum evaluation criteria, but this does not mean that such experience necessarily gives a vendor an advantage in the evaluation process.

Q37. Do you favor a vendor to work onsite with your team?

A37. No, the vendor will not be working onsite .

Q38. What do you feel will be the most challenging aspect of this project?

A38. We have not prioritized the project on a scale of most challenging to least challenging.

Q39. What are your teams strengths and weaknesses in regards to this project?

A39. The various people on our time and their skills will be discussed with the successful vendor.

Q40. Is there an incumbent vendor for this project? If so, could you share whom this is and if they are eligible to respond?

A40. No. This is a new project with no incumbent vendor.

Q41. Please explain your expectations around training. How many staff? What level?

A41. We are looking for training with our small group of Web Development and IT staff to review how the site has been developed. We will then train the rest of our internal users.

Q42. Please explain your expectations around site testing.

A42. The site should be thoroughly tested by the vendor before final delivery.

Q43. Are you able to share a budget or ideal budget range?

A43. Please see the answer to question Q12.

Q44. Will the online form be built in Drupal or is there an external application integration required? If so, please share more details.

A44. We will be building the online giving form internally using Drupal.

Q45. The RFP has a very detailed Site Map outline per page/section for the new site. When the contracted web firm gains knowledge during the planning phase of the working process that might steer the strategy differently from that outlined in the RFP, will the client team be open to new site map recommendations?

A45. Yes, we will be open to new site map recommendations.

Q46. The Site Map includes several videos (short video clips, campaign kick-off video, campaign priorities) - are these videos going to be created in-house or are you looking for ballpark pricing to produce?

A46. The videos will be created either in house or outsourced to a different vendor. The contractor is not responsible for creating videos.

Q47. Do you plan to use external resources to create the Campaign brand? If so, will that be a separate RFP that kor group can respond to?

A47. At this time there are no plans for a RFP to be issued for Campaign brand creation.

Q48. Online Giving Form: Can you please elaborate on what you have in mind in terms of integration and our associated responsibilities?

A48. Primarily we are looking for links between the giving form and the vendor-developed website.

Q49. Template Designs for future site updates: are these just psd's or available themes/modules in Drupal?

A49. See the answer to question Q34.

Q50. Video – What type of Brightcove account do you currently have?

A50. UMass has an enterprise Brightcove account.

Q51. Newsletters – will the site need to be integrated with a 3rd party email service provider? If so, please provide name. If not, will users be able to sign up to receive the newsletter from the site?

A51. No. There is neither a third party email service nor will users be able to sign up to receive newsletters.

Q52. Contact Form – where is the submitted information going to be stored? Integrated with CRM or just Drupal?

A52. The submitted information should be stored within Drupal.

Q53. Can you please identify any (if at all) integration points between the public site and any other systems (CRM, ERP, Paypal, etc.)? Will we be responsible for this integration?

A53. There is no external system integration for which the vendor will be responsible.

Q54. Will the site have any password protected areas (for users not Drupal admin)?

A54. Yes, there will be areas of the site that are password protected for end users.

Q55. We assume mobile compatibility is a requirement, please confirm.

A55. Please see the answer to question Q2.

Q56. It appears the OIT will be responsible for provisioning the site (Drupal) using an existing UMass profile as well as approved modules if required. As is the case, will we have full access to the server in the event modifications are needed, or will OIT be responsible for making these changes based on vendor direction?

A56. OIT is responsible for making any necessary modifications.

Q57. Does the Development department staff have experience working with Drupal?

A57. Some UMass staff have experience working with, including developing sites in, Drupal. Some have no experience.

Q58. You mention conservation of resources, will you only accept hardcopy proposals? Is an emailed PDF an option?

A58. An emailed PDF is acceptable.

Q59. Do you have a budget for this project? What is the budget range?

A59. Please see the answer to question Q12.

Q60. How much does higher education experience contribute to the evaluation of proposals? Does public sector experience count? (Question needs to be reworded.)

A60. Prior experience working with UMass is a consideration as is experience working with other public entities (see section 6.0 of the RFP). Such experience does not necessarily give vendors with this experience an advantage. As outlined in the RFP, other factors have higher priority.

Q61. Do you prefer on-site training or would remote training be preferred to save money?

A61. There is no specific preference for either on-site or remote training.

Q62. Do you have a reason to host video on your server or would having a channel on YouTube or some other video service meet your needs?

A62. Please see the answer to question Q10.

Q63. Do you have a timeline for producing new content and videos?

A63. Content and videos will be produced continually throughout the life of the project.

Q64. Do you want social media integration, e.g. Twitter, Facebook, LinkedIn, etc?

A64. Yes. Social media integration will likely be required.

Q65. As short listed vendors would be asked to give a presentation, will you prefer on-campus presentations over virtual presentations?

A65. There is no preference. It will depend on the convenience of UMass and of the vendor(s).

Q66. Will a theme or .psd of the theme be provided or will the vendors create one from scratch?

A66. The UMass standard Drupal base theme is AdaptiveTheme (<http://drupal.org/project/adaptivetheme>). We are looking for a theme based on this, although other solutions will be considered.

Q67. How will the donations be processed? On-site e-commerce? Any preference in using Ubercart vs. Drupal Commerce? Use an external site for financial transactions? Another method?

A67. The processing of donations is outside the scope of this RFP.

Q68. How will you want to host the site? Will we develop on that same server?

A68. The site will be hosted at UMass Amherst. A development server will be made available to the vendor on which to develop the site.

Q69. Do you want the developer to create a production and test environment implement release control like git?

A69. Please see the answer to question Q18.

Q70. The RFP clearly calls for Drupal, and use of an OIT provided Drupal distribution. While details of that distribution will be provided to the successful vendor, could you outline:

· What version of Drupal that distribution is based on? (Or is it fair to assume Drupal 7?)

· What modules are included (and what modules can be included)? (Or should we identify modules we think might be of use in our response?)

A70. Please see the answer to question Q1 with regard to Drupal version. Please see the answer to question Q94 with regard to modules.

Q71. There are multiple mentions of video in the current site, and in one place (in Section 5.0, under News and Media), Brightcove is mentioned. Should we assume that the Brightcove platform is the preferred video delivery approach, or should we include identification/selection of a video platform in the proposal?

A71. Yes, you should assume that Brightcove is the preferred video delivery approach. Also see the answer to question Q10.

Q72. The RFP specifically excludes copywriting from the services being proposed. Should we assume this also includes actual video production (writing, shooting, editing, etc.)?

A72. Yes, you should assume that video production is excluded from this project.

Q73. Does UMass Amherst have school specific accessibility requirements beyond 508 compliance? Please specify your targeted browsers.

A73. Please see the answers to questions Q5 and Q7.

Q74. Can we assume all visual content such as video and photos will be provided and provided in web optimized formats? Is UMass Amherst looking for support in any areas of this content development? If so which areas?

A74. Yes, you can assume that content that is provided will be in web-optimized formats. UMass Amherst is not looking for support in the area of content development.

Q75. Will the Campaign Progress source be data (or dynamically) driven?

A75. No. Campaign progress will not be data-driven.

Q76. Can you provide the list of Drupal modules allowed for use on the site?

A76. Please see the answer to question Q98.

Q77. What version of Drupal will be used for the site?

A77. See answer to question Q1.

Q78. Are there any further details of the UMass Amherst Drupal environment which can be shared? In particular, are there restrictions on using tools like Boost (static page caching), Git (version control) and Drush (site update tool) which we can be made aware of?

A78. Git is acceptable development tools. Drush and Boost could be considered but most likely will not be allowed in the UMass development environment.

Q79. Can any further details be provided at this point regarding the nature of the integration of the online giving form?

A79. Please see the answer to question Q48.

Q80. Will all video assets be hosted on BrightCove? If no, is it known which other hosts will be used?

A80. See answer to question Q1.

Q81. What specific services does UMass anticipate for ongoing support?

A81. We anticipate minimal ongoing support.

Q82. What is the financial goal of the campaign? How many years will it extend? How many different types of giving are planned?

A82. The website will be live indefinitely. The campaign will be in place for a shorter period of time, but the web site will continue after the end of the campaign. To see types of giving, please go to the current UMass Giving site at <http://www.umass.edu/giving/opportunities/>

Q83. Will this newly designed website eventually replace the developments and giving sites noted in the RFP? If not, how will they work together?

A83. The newly-designed site is intended to integrate the other development and giving sites referenced in the RFP and to replace them at the time of launch.

Q84. Is there a website committee for this project? If so, please describe the composition and approval process necessary.

A84. There is a committee. The approval process is outlined in the RFP, specifically in section 6.0, 7.0, and 8.0.

Q85. How will UMass Amherst gauge the success of the website beyond increased donations?

A85. Usability, ease of updating, design quality and increased donations are some, but not all, of the criteria used to measure the success of the site.

Q86. Is the expectation that the partner firm will populate the site with content (provided by UMass Amherst) and push it live? Please specify final deliverable desired.

A86. It is the expectation that UMass Amherst will do most of the content population.

Q86. Please describe the Development Department staff and their technical skill set?

A86. Relevant members of the Development Department staff will be introduced to the selected vendor.

Q87. What is the targeted budget or budget range? When will the final deliverables be expected by UMass Amherst in order to meet the October 1 launch date?

A87. With regard to the budget, please see the answer to question Q12. The schedule of deliverables and other development key dates should be presented to UMass Amherst in the response to the RFP.

Q88. For how many years will the Campaign run?

A88. The website has an unlimited run.

Q89. Do you foresee the site needing any major updates during the campaign beyond what can be handled by in-house staff?

A89. No, we do not anticipate major updates.

Q90. Is this the current Online Giving Form that will be redeveloped?

https://www.umass.edu/development/give/?ref=gum_givenow

A91. Yes. This is the form. The redevelopment of this form will be done in-house and is outside the scope of this RFP.

Q91. You state that “UMass will be re-developing the online giving form in-house.” Who will be responsible for integrating credit card processing for the online giving form, UMass or vendor?

A91. UMass is responsible for integrating credit card processing.

Q92. Can you provide more details about the current online giving solution (is it a commercial solution such as Raiser’s Edge or custom built in-house?). What is the database and programming language used?

A92. The current online giving solution is a custom in-house solution. Again, the redevelopment of this will be done in-house and is not included in the scope of this RFP.

Q93. What version of Drupal is the university standardized on?

A93. See answer to question Q1.

Q94. What are the approved Drupal modules? Will we be permitted to incorporate additional contributed Drupal modules that are not necessarily currently approved, if they would improve the product? If necessary, would we be permitted to develop our own custom modules?

Q94. The list of approved modules will be made available to the successful vendor. Additional modules will be approved on a case-by-case basis. We will also consider custom modules if necessary.

Q95. Will the online giving form under development by UMass resources be developed as a Drupal module, or will it be developed outside of Drupal, and have to be converted into a module?

A95. The online giving form will be developed by UMass Amherst, not by vendor. It is currently not created in Drupal. UMass will convert the form to Drupal.

Q96. You indicate awarding the contract in Feb or March and that the site must be live by Oct 1st. While a five month project timeline should be manageable for a campaign site, are there any periods of time that the development staff will have limited time to focus on this project that we should factor into our project plan?

A96. The development staff will be available throughout the length of the development process.

Q97. Are you looking for recommendations related to the structure of content, or should that be considered finalized?

A97. We are not specifically looking for content recommendations but are open to suggestions.

END OF ADDENDUM