

CARNEGIE

Website Redesign

Request for Proposals Guide

How to use this guide:

1. File > Make a Copy
2. Download in your desired document format for editing purposes
3. Share with your team

CARNEGIE

Website Redesign Request for Proposals Guide

Thank you for downloading Carnegie's Website Redesign Request for Proposals (RFP) Guide. We hope you find this resource useful as you seek proposals for your next project.

This guide contains prompts and sections commonly found in RFPs. We've also included our recommendations from nearly two decades of working with higher education institutions on redesigning their websites.

You'll see numerous sections, each included with the following:

Quick descriptions of the section and suggestions of what to think about when writing your RFP. You can erase these descriptions after you've read them.

- Suggested wording to include in your RFP. Be sure to alter, delete, or add your own as you see fit.

Once you're ready to begin, delete this page and start filling out your info below. Remember, you can add/edit/delete any wording or sections you see fit for your projects!

If you'd like to submit a request for proposal to Carnegie, email

RFP@carnegiehighered.com

Introduction

Your introduction should include a high-level summary of the scope of work. You might consider including particular qualities your institution values in an ideal partner such as:

- Experience in higher education
- Preference for a local partner
- Woman- or minority-owned business

Key Proposal Dates

Do you have a target deliverable schedule in mind? This needs to be included in your RFP so potential partners can properly gauge if they have the resources and bandwidth to complete the project on time. Important dates to include:

- Deadline for questions and when you anticipate answering them
- Deadline to submit a proposal (including specific time of the day, if applicable)

When possible, it's great to include tentative dates or a timeframe for the following aspects of your partner selection process — recognizing, of course, that these may change:

- Finalist selection and presentations
- Partner selection
- Ideal kickoff
- Ideal launch date

About Your Institution

This section should include details about the history, mission, and essence of your institution (degree types, population, etc.), enrollment and donor trends, and a list of your primary competitors.

When possible, include information regarding the current status of your brand —

both messaging and visual identity — and if the brand requires any updates that might become part of or impact this project.

This is also a good place to mention recent audience research, updates to your strategic plan, or anything else that might have an impact on the discovery process or the project at large.

About Your Current Website

Include a high-level summary or in-depth details about your current institutional website. Consider including:

- **Target audiences** (primary and secondary)
- **Information about your governance structure:**
 - Do you have a centralized or decentralized model?
 - How many content creators and publishers are active in the system?
 - Will you add or decrease content creators moving forward?
 - Does the current governance model work for you? If not, what are your most significant pain points?
 - Website pain points
- **Information about your Content Management System (CMS):**
 - What CMS are you currently using?
 - Do you plan to stay on it?
 - If you'd like to move off of your current system, do you have preferences regarding a specific system or type of system (open-source vs commercial platforms)?
- **Size of the site** (number of pages):
 - When was your last content audit? What were the results?
 - Are you interested in decreasing your page count?

- **Date of your last redesign, and whether it was completed internally or by an external partner.** If you've re-skinned the site or undertaken any other significant updates, this is a good place to highlight them.
- **Analytics.** Your selected partner will likely take an in-depth dive early on in the redesign process. But if you're seeing significant trends or concerns, this is helpful information to include in the RFP. Alternatively, if you have Google Analytics in place but are not actively using this data, consider including this in the RFP.

Project Goals and Priorities

This section gets to the heart of how your selected partner might best meet your needs. It might include:

Ideal outcomes and business objectives including:

- Responsive/mobile-friendly design
- Improved user experience
- Ease of use in CMS for content contributors
- Eliminate redundancy and simplify content
- ADA compliance
- Alignment to new or existing brand
- Enhanced search capabilities
- Improve/optimize load time
- Improve perception of the institution
- Increase in applications
- Increase yield of best-fit students
- Increase in donations/alumni participation

Anticipated scope of work (detailed is always appreciated).

Here's a starter list for a recommended website redesign approach:

- **Discovery:** stakeholder interviews, focus groups, journey mapping, competitor analysis, analytics review, or other research processes.

- Strategy
- Content strategy: Information architecture, content models, and editorial planning
- Content development: Will you look to your selected partner for assistance in content development? If so, what types of pages will be the highest priority for them to take on? Approximately how many pages would you like your selected partner to write?
- Search Engine Optimization (SEO)
- Visual design
- Front-end development
- Implementation in CMS
 - QA testing
 - Content migration
- Post-launch and ongoing support
- Other:
 - Hosting
 - Workshops and training
 - Intranet strategy, design, and development
 - Photography and videography
 - Site search
 - Academic Program Finder
- **Out of project scope.** It's helpful to know if any sites won't be included in the redesign. These may include the Library(/ies), Athletics, Advancement/alumni microsites, and the Bookstore.

Please share any technology specifications/requirements such as systems or integrations including:

- Student Information System (SIS)
- Customer Relations Management system (CRM)
- Enterprise Resource Planning (ERP)
- Advancement/Giving portal

- Academic Catalog
- Forms
- Directories
- Calendar
- News
- Blogs
- **Ideal timeline.** We recommend nine months to a year for the full website redesign project of most sites; larger institutions may want to consider a timeline of 18 months or more.
- **Anticipated budget.** The initial big fear institutions have in sharing their budget is that potential partners will artificially raise their prices to meet the budget. In our experience, there are more advantages to sharing the budget than not.
 1. Right-fit partners will use their expertise to help you minimize your budget risk as part of their proposal. This may come in the form of cost saving ideas, innovative scope alternatives, and more. It makes the proposal documents more valuable and your interviews more productive.
 2. It is easier for potential partners to differentiate themselves in your selection process. Only those vendor teams with expertise can provide cost savings and value adding innovations. Also, any ideas that are contained within a proposal will have to be specific to your project. Including the budget helps minimize the generic nature of many proposals.
 3. It helps the potential partners better understand the intent of your scope and propose. A scope with a budget defines the needs and desires of the client but does so within the framework of their constraints and resources.
 4. If set up properly, agencies can explain, in detail, why your budget and their estimated pricing are different. Often we have seen where client project teams are under pressure to make a project happen, even when the project team feels the budget is inadequate. They try to convince their superiors

that the budget is wrong, but often to no avail. The proposal process can be used to help clarify reality and provide the project team more, and better, cost information that can be used in discussions with stakeholders and VIPs.

Project Team

Include information about who your chosen partner will work with including their titles and roles. If you're planning on doing some of the project work internally, note it here, along with the capabilities and resources you have at your institution. If you have existing partners that will remain in place and overlap with the website redesign project (such as a digital marketing partner), this is a good place to highlight them.

RFP instructions

If your institution has a very specific procurement process, you'll likely receive these requirements from your Procurement/Purchasing team. It's helpful for potential partners to know the following details, at minimum:

- Who can agencies contact with questions about the RFP? Is there a deadline for submission of questions? What is the required format for question submission?
- Does the proposal need to follow a specific format?
- How should the proposal be submitted? Can it be emailed, or does your institution require hard copies in the mail? If it must be mailed, does it need to be bound in a specific way, and do agencies need to include a digital copy as well? Is there a page limit? If it should be emailed, do you want something specific in the subject line to flag it as a proposal?
- Do you need to receive the proposal by a specific time on the day it's due?

- What information *must* the agency include in the proposal (project team, case studies, references, project management, etc.)?
- Do you want the pricing to be broken out in a particular way? Does it need to be submitted separately from the technical proposal?

Evaluation Criteria

Don't be afraid to ask questions within your RFP that will give you a good sense of the agency's core values, differentiators, priorities, and viewpoints. Your evaluation rubric should award the highest range of points for the most important criteria for your institution. It's wise to give more weight to an agency's experience with similar projects and ability to deliver on the scope at hand.

Here's an example of an evaluation rubric:

Criteria	Points (100 point scale)
Ability to meet the requirements of the RFP	
Experience with projects of similar scope, complexity, and magnitude	
Experience within the higher education market	
Experience with specific content management systems	
Approach and work plan	
Presentation evaluation: • Did they address concerns and answer all your questions?	

• Did you have good chemistry with the agency?	
References	
Value and Cost	
Timeline	
Certification as a minority-owned, women-owned, or veteran-owned business	
Level of involvement from subcontractors or proclivity to outsource work	
Proximity to your institution, when relevant/important to you	
Total Points:	

Terms & Conditions

What policies or procedures must the agency abide by if chosen? How can the agency redline or adjust these if needed?

Bonus: Finalist Presentation Questions

While proposals are vital to whittling down your prospective agency list, finalist presentations affirm the best match for project's, institution's, and team's needs. You'll likely arrive to the meeting with extensive questions about each agency's approach. Consider asking some of the following questions of each of your finalists:

- What sets you apart from other agencies?
- Why is your experience [in higher ed, with our type of institution, with this CMS, etc.] important?
- Do you foresee risks that could impact our project? What are they, and how might you combat those?
- How will you surface the needs of our primary and secondary audiences?
- What data points do you use to make strategy decisions?
- How will you define and measure success?
- Tell us about your most challenging project and how you resolved those challenges.
- What work are you most proud of, and why?
- What do you need from us to ensure success?
- How will you set us apart from our competitors?