



INDIANA UNIVERSITY

PURCHASING DEPARTMENT

Request for Proposal #RFP-TEC-1406-2024

Purpose

Indiana University (IU) is requesting proposals from firms interested in developing, helping to implement, and provide consultation for a comprehensive enterprise content strategy (ECS) as specified herein. The intent of this Request for Proposal (RFP) and the ensuing process is to provide companies with the information, requirements, and specifications necessary for the preparation of a professional and comprehensive proposal. Specific terms and conditions are outlined.

Background

In 2023, Indiana University launched an ambitious Digital Strategy Initiative (DSI) to streamline and improve the way it communicates with students, faculty, staff, and the broader community via web, text messaging (SMS), and email. The initiative aims to create more connected, personalized, and seamless experiences for IU's constituents. This will not only have a positive impact on the university's reputation and brand sentiment but also aid in development student recruitment and retention across all IU campuses.

IU's web presence spans 2,000+ websites managed by hundreds of schools, units, and departments. An investigation found that 31% of these sites are unmaintained or dead, revealing five primary concerns: findability, content, experience, support, and maintenance. DSI is addressing these challenges and improving the university's web presence by consolidating domains, providing improved tools and support, and developing an enterprise content strategy. The most transformative of the three solutions, the ECS will ensure that all university goals and objectives align with the needs of current and prospective students, faculty, staff, alumni, and community members, while also presenting a consistent and up-to-date message across all channels and platforms.

ECS research began in earnest in May 2023. Over the last six months, our team has completed:

- Stakeholder interviews with participants ranging from vice presidents and chiefs of staff to marcom directors and departmental web developers
- Digital ecosystem map based on web audit of IU's top 500 pages by traffic and key focus areas such as student recruitment and success, research, and development.
- "Quick win" updates to campus homepages to address critical concerns impacting student recruitment and success
- Top tasks research based on nearly 800 surveys of students, faculty, staff, alumni, and community members
- Situational analysis of IU's digital ecosystem and domain and website consolidation

The situational analysis confirmed that the university's concerns about search rankings, content quality, user experience, and tools and support are well founded and represent serious challenges to university wide goals of recruitment, enrollment, retention, reputation building, and fundraising/attracting grant money. The next necessary step is to focus on shifting the university's entire culture of content to make choices based on best practices and data; to improve overall user experiences and the usefulness and relevance of web content; and to establish centralized content models and a governance framework.

Selection of the successful company (Supplier) will be based upon the following factors, with the most weight placed on the Scope of Work and the confidence that Supplier will give Indiana University the tools to expand upon work done thus far and operationalize, manage, scale, and sustain a content strategy across its entire enterprise. Note: some items in the Scope will be a continuance of in-progress activities.

- Ability to Meet Statement of Needs (Scope of Work)
- Price
- Value Add
- Client base of organizations of like complexity and similar needs to IU
- References
- Acceptance of Terms & Conditions

This criteria have been listed in order of importance.

As used within this RFP, "Participant" shall refer to those companies receiving and responding to this RFP. "Supplier" shall refer to the successful Participant of the process. "University" shall refer to Indiana University.

If the Participant will not be selling directly to the University, it is the Participant's responsibility to choose a single reseller with whom they will partner with on this project.

Schedule of Events (Subject to Change)

Request for Proposal issued: November 29, 2023

Q&A submission close date: December 13, 2023

Proposals due by: December 21, 2023

Selection of Supplier on or about: January 15, 2024

Implementation of services, on or before: January 26, 2024

All questions and inquiries regarding this document should be submitted via the JAGGAER Supplier Portal. If you experience issues you may directly contact Purchasing Contract Manager, Maria Nguyen, at nguyenmt@iu.edu . EXCEPT FOR CASES AUTHORIZED IN WRITING BY Maria Nguyen, DURING THE DURATION OF THIS RFP PROCESS, THROUGH SELECTION AND NOTIFICATION, ANY COMMUNICATION BY PARTICIPANTS WITH INDIANA UNIVERSITY STAFF OTHER THAN Maria Nguyen MAY RESULT IN IMMEDIATE REJECTION OF THAT PARTICIPANT. Questions regarding this RFP should be submitted through the Q&A Board within the Supplier Portal. Questions asked after the deadline may not be answered.

Statement of Needs

F1 Objectives

Indiana University is working to improve its overall digital strategy to tackle significant user experience and content challenges, including:

- Unsatisfactory findability and website organization
- Disparate, inconsistent experiences across websites
- Out of date and conflicting content across thousands of sites
- Absence of guidance and long-term support of web tools and websites

In addition to consolidating domains and reviewing tools and resources, the university recognizes a key opportunity to reimagine how it develops and manages digital content

across all campuses, services, channels, and platforms. The objective of this project is to establish an Enterprise Content Strategy (ECS) for Indiana University to guide IU's entire culture of content. As part of a three-year initiative with multiple phases of strategy and growth, the ECS will consist of four operational frameworks shared across the organization:

- Purpose: How we make decisions about content
- Standards: How we keep content consistent, accurate, inclusive
- Process: How we synchronize enterprise content activities
- Models: How we structure content in systems

The ECS should guide IU teams to create and manage content that is valuable to IU audiences, aligned with our overall business objectives and consistent across channels and platforms. A successful ECS helps organizations deliver the right content to the right audience at the right time. It will help IU achieve:

- Improved user engagement and satisfaction for internal and external audiences
- Elevated brand visibility and perception
- Reduced service and support costs
- More measurable return on investment
- Increased process efficiencies

F2 Scope of Work

Our team anticipates the following activities and tasks to operationalize IU's Enterprise Content Strategy over the next calendar year (January–December 2024):

- Key audience user journey definition and mapping
- Search intent analysis
- Internal search audit and analysis
- Content and design role and skills gap analysis
- Develop content playbook
- Define content governance model
- Define career pathways for content and design
- Develop measurement framework
- Identify change management needs
- Develop onboarding and training materials
- Key Initiatives: Develop and test recommended activities at a smaller scale, expanding for large-scale implementation.

F3 Value Add

The following are considered value adds to the tasks and activities outlined in the Scope of Work.

- Provide group coaching and workshops on the intricacies of content strategy and scaling its implementation to content strategy staff members
- Provide guidance/coaching on needs such as workflow and processes
- Provide information sessions/primers to Indiana University Communications and Marketing leadership and relevant staff members
- Provide guidance on development of job descriptions for roles within IU's content strategy vertical
- Status as a minority-owned or woman-owned enterprise

Proposal Responses:

The Participant's response to this proposal should include answers to the following series of questions. So that the RFP Team can easily follow the questions and responses, please assure that the question is stated immediately before the response. In addition to point-by-point responses, you may include descriptive literature if you make reference to specific contents. In reviewing the proposals, university personnel will not search through general literature. Where a question is asked, answer the question and supply any supportive detail. Any deviation from this format and sequence may result in the proposal being immediately rejected.

While responses should address all solicitation items, it is important to note that we also encourage and will consider any creative ideas for improvements or cost savings related to this transaction that may not be suggested in this document. Functional, technical, and economic solutions beyond the confines of this solicitation may also be considered.

The responses should address all solicitation items. However the University reserves the right to consider other ideas and solutions, or only a restricted subset of the configuration discussed in this document.

All optional arrangements should be described and priced separately.

All proposal responses must include:

1. The name, phone, and email address for the duly authorized agent submitting the proposal.
2. Full description of company, including experience, qualifications and executive leadership chart.
3. Documentation of any intent to use another company(ies) or private individual(s) as a subcontractor(s) for any part or the whole of the services offered in response to this RFP. Indiana University reserves the right to

approve or reject any subcontracting agent or to reject proposals based on the use of subcontracted work.

4. Copies of all documents that could become part of a final Agreement arising from this process. A legal review of the Participant's proposed Agreement terms will be part of the criteria in evaluating the Participant's offer.
5. Three references from previous clients.
6. Describe in detail your company's capability of providing the services required.
7. Describe in detail other products and/or services your company has provided in the past 3-5 years for an institution of higher education that has a traditional student population. If your company is unable to provide engagements specific to higher education, please advise and describe in detail similar engagements your company has executed for the same time period.
8. Describe your methodology for providing these services, how you organize your team and the IU team, and how you ensure you deliver a quality product that meets expectations.
9. Describe the individual staff members in your company that would be assigned to this project. IU reserves the right to request resumes as needed.
10. Include all other things that would pertain to this type of product or service.
11. Describe how you would break down this project into specific tasks with a timeline and assigned costs as described in this RFP's Statement of Needs.

Costs

12. Provide base proposal for product and installation.
13. Identify any other software or hardware products that are needed along with the base product that you provide.
14. Indicate what price guarantees or caps are offered on annual support, or any other component.
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- 16.** Identify training options available and costs associated with those options.
- 17.** Identify implementation and deployment service options and costs associated.
- 18.** Specify the complete warranty terms and conditions for all products and services.
- 19.** For all items, indicate the timeframe or expiration date for the price quoted. If prices are subject to change, indicate the pricing beyond the expiration date.
- 20.** Attach a copy of all relevant terms and conditions, such as sample contracts, Service Level Agreements, etc.
- 21.** We encourage submitting vendors to be creative and flexible in offering pricing, financing, or other options. Indicate any other terms, discounts, conditions, opportunities, or arrangements that may be of value and interest to IU.

Data Privacy and Security

In the course of performing the activities that are the subject of this RFP, your organization and personnel may access, collect, receive, maintain, distribute, process, store, use, transmit, dispose of, and otherwise handle or be exposed to sensitive institutional data of Indiana University (hereafter, “data activities”). The data may be in hard copy (paper) and/or electronic format.

- 22.** Please describe the measures your organization and personnel will take to ensure that:
 - a. all data activities are performed in a sufficiently secure manner to protect against reasonably anticipated threats or hazards to the security or integrity of such data, and to prevent unauthorized access to or use of the data;
 - b. all data activities involving Indiana University (IU) institutional data are performed in accordance with all applicable laws and IU policies, as well as prevailing commercial best practices with regard to the type(s) of data involved. These include but are not limited to:
 - (i) The Safeguards Rule of the Financial Services Modernization Act of 1999 (Gramm-Leach-Bliley or GLB);

- (ii) The Health Insurance Portability and Accountability Act(HIPAA) Privacy and Security Rules;
 - (iii) The Family Educational Rights and Privacy Act (FERPA);
 - (iv) The Payment Card Industry Data Security Standards (PCIDSS);
 - (v) The Fair and Accurate Credit Transaction (FACT) Act of 2003and amendments thereof;
 - (vi) Indiana University Information Technology Policy IT-12;
 - (vii) National Institute of Standards of Technology (NIST) standardsfound at <http://csrc.nist.gov/publications/PubsFIPS.html> and <http://csrc.nist.gov/publications/PubsByLR.html> applicable as identified by Indiana University;
 - (viii) General Data Protection Regulation (EU **GDPR**).
- c. you are able to detect and respond to security breaches that may expose IUinstitutional data to unauthorized access or use;
- d. as applicable, you have a written program in place to identify, detect, and address warning signs of identity theft, pursuant to the FACT Act and corresponding “RedFlag Rules;”
- e. you conduct regular internal security tests and/or audits including vulnerability scans, application security assessment scans and penetration tests conducted by personnel or contractors with appropriate expertise;
- f. you are able to promptly discover and respond to publicly-known software bugsor other security threats that may expose IU institutional data to risk of unauthorized access or use;
- g. you retain, and can provide to IU on request, authentication and other relevant system logs for a minimum of 60 days to facilitate the investigation of securityincidents;
- h. in accordance with Indiana Code 4-1-10, your organization and personnel will not disclose to any third party any Social Security Numbers received or obtained fromIU, except (i) as required by state or federal law or a valid court order or (ii) with prior written authorization from IU;
- i. your organization will notify IU immediately in the event of a breach of your electronic or paper records systems that reasonably appears to have resulted in thedisclosure or exposure of IU institutional data, and cooperate fully with IU’s efforts to investigate the incident and to provide notice as appropriate to the individuals whose data was involved and to others as required by law or deemed appropriate by IU;
- j. IU institutional data is only accessed and used for the purpose of performing the activities that are the subject of this RFP, and will not be

- used for targeted marketing purposes;
 - k. IU institutional data is only accessed and used by those personnel within your organization, or approved subcontractors, who require access to perform activities that are the subject of this RFP;
 - l. IU institutional data will not be shared with any third party except as required by state or federal law or a valid court order, or with prior written consent from IU and the individual(s) whose personal records would be disclosed; and
 - m. your personnel and approved subcontractors understand, accept, and have received appropriate instruction regarding their obligations to handle IU institutional data with the proper security as described above, and all such personnel and subcontractors will have read, understood, accepted, and received appropriate instruction as to how to comply with, the data protection provisions reflected in this RFP and the ultimate agreement between your organization and IU.
- 23.** Please provide a copy of all policies and procedures within your organization that relate to the measures described in #22 above.
- 24.** What procedures and safeguards are in place to ensure the return of University data, or provide permanent access to University data, even if the relationship terms.
- 25.** Please provide the name(s) and contact information for the person(s) responsible in your organization for electronic and paper records security.