7. The above numbered solicitation is amended as set forth in Item 9 below.

8. The hour and dates specified for receipt of proposals/quotations: ☒ is not extended; ☐ is extended as described in Item 9 below.

9. Description of Amendment/Modification:

The purpose of this solicitation amendment is to inform prospective offerors/bidders that the above numbered solicitation is hereby amended to provide responses to questions as follows.

**Quote Preparation**

**What is the ballpark timeline for making this decision?**
Answer: This is already outlined in the solicitation under RFQ Schedule.

**Would a point of contact from a different IIE project be considered eligible to use as a reference?**
Answer: Yes.

**Do you have a wish list for website improvements that you can share?**
Answer: The RFQ and this Amendment are comprehensive in describing what is needed.

**The RFQ does not mention SEO, but we think it would help your audience find you. Would you be open to ongoing SEO as part of the site maintenance?**
Answer: We are open to ongoing SEO as part of the site maintenance and are open to a quote for this service.

**From a proposal capabilities perspective, what would be most helpful to IIE given the RFQ is about Drupal in the short-term and potentially WordPress in the future?**
Answer: If a firm can only maintain the website in Drupal, their proposal should be clear about that. If a firm can only maintain the website in WordPress, the proposal should include an estimate to move the website to WordPress.
**Technical**

How is your website currently being maintained?
Answer: An external vendor is currently maintaining the website with the consultation and guidance of IIE. IIE provides editorial content edits and directives for website updates (such as navigation changes and archiving of pages).

What processes do you have in place for monitoring performance, security and conducting maintenance across your portfolio of websites?
Answer: IIE monitors performance using Google Analytics. The vendor would be responsible for maintaining website security and conducting maintenance.

Does the site need to be Accessible?
Answer: Yes, the website should be ADA accessible.

Is IIE in contract with Pantheon directly or through the existing incumbent or vendor?
Answer: The existing incumbent currently manages the website’s hosting plan on Pantheon. Upon expiration of the current vendor contract, IIE intends to move the website to its own Pantheon hosting plan and manage the hosting internally. If the new vendor moves the website to WordPress, IIE will manage the hosting on its WPEngine plan.

Regarding hosting, can you elaborate on any aspects of hosting you’d like to accomplish in the future that you don’t currently have supported?
Answer: We would like to eventually host the website in WPEngine.

Are you currently using the Development, Staging and Production server arrangement? Do you have a Drupal workflow for managing content updates?
Answer: Yes. Workflow for managing content updates is administrator/publisher/editor.

Do you have visual regression, unit, or end-to-end testing set up on the platform for quality assurance?
Answer: Yes, this is in place and the new vendor should always test for quality assurance prior to live publication.

Do you currently have dashboards or any reporting set up with your Google Analytics account to retrieve insights about your web presence?
Answer: We are currently using the basic functions of Google Analytics for insights on website engagement.
Can you provide details on traffic and sizing, such as average pageviews per month, average visits per month?  
Answer: On average we have 4,686 page views per month.

Please list any third-party system integrations with the new website.  
Answer: There are no major third-party integrations, but the website is currently using Honeypot, Spam, SendGrid, ReCAPTCHA, Google Translate, and newsletter subscribe plug-in with MailChimp.

If a third-party vendor tool integrated into the site is found defective, would your team directly coordinate with the vendor to resolve the issue, or is it expected that the vendor of record would handle the matter?  
Answer: If there was an issue with a third-party vendor tool, the iiepeer.org web vendor would be expected to resolve in consultation with IIE.

Do you currently maintain a backlog of improvements/enhancements/fixes or a roadmap for the site?  
What are some of the larger or high priority items in your backlog?  
Answer: There is a backlog of improvements/enhancements to the site which entail the simplification of the website design and ensuring all pages are linked to the correct content. The high priority items would be to simplify the homepage design, simplify the top navigation, and unpublish/archive certain pages. The backlog is contingent on how much can be completed by the existing vendor before the contract ends.

How frequently do you have new projects or enhancements to the website beyond regular maintenance?  
Answer: Once the current backlog is completed enhancements would be minimal aside from regular maintenance.

Regarding “Landing pages, which generate automatically based on featured images and excerpts of pages within that section” can we assume this is referring to Drupal views?  
Answer: Testing the functionality of landing pages prior to publication would be required no matter the CMS, which includes Drupal views.

Can you provide Field List reports to help us understand the complexity of your site?  
Answer: The Field List report pulls from the Contact form [https://iiepeer.org/contact].
Scope of Work

What internal team resources are being devoted to this project? What will they be responsible for as a part of this engagement?
Answer: IIE staff will manage editorial content updates and entering of information and text and photos. The vendor needs to ensure pages are easily editable by IIE staff including IIE’s ability to easily manage categories within filters. It should be easy and simple for IIE’s web editor to edit and manage content.

Can you outline your current workflow for implementing design updates?
Answer: IIE determines if a UX/UI or editorial update is needed. IIE submits a ticket to the current vendor requesting updates or support with updates we are not able to complete due to editing complications. The vendor makes updates, IIE reviews and gives feedback, and updates are published after IIE approval.

Are authors facing any challenges in this workflow, and if so, are they able to address these challenges independently, or do they require additional development support?
Answer: IIE staff is responsible for editorial updates and submissions, and we face challenges with technical errors when publishing updates, which then require development support. For example, a content update is published but the update will not reflect on the live site. We face challenges with a lack of simplicity for managing content edits and need updates that will allow for easy, simple management by our editors. We also face challenges with timely communication from the vendor.

Regarding “Consulting on the creation or purchase of any new website assets” Can you give an example of the type of assets to be purchased?
Answer: If there are new features, plug-ins or third-party products the vendor recommends or finds necessary to maintain the website, IIE should be consulted on the options before purchase of the plug-in or third-party product.

Can you give an example of the type of design enhancements you may need and some idea of how often these would need to be done?
Answer: The design of the homepage, for example, needs to be improved and simplified. Another example, design and functionality of the “Opportunities for Students” section needs to be refined and updated.

Why are you looking to potentially move from Drupal to WordPress?
Answer: We are considering a move to WordPress because IIE.org is on WordPress and IIE hosts nearly all of its program pages on WPEngine. A WordPress framework would allow for consistency with IIE’s other webpages.
Are there any known issues with the current setup or website? Can you elaborate on the main challenges you face with the current website and setup?
Answer: The current user experience is not user friendly or intuitive. The website contains many instances of outdated/inaccurate information on website, dead ends, and when IIE staff attempt to make updates to content we face technical errors/broken links when publishing. Filtering functions on the resources/opportunities page is an ongoing challenge and needs a major overhaul. Minor layout changes are also necessary including updates to navigation, front page clean-up/removal of content, and archival of numerous pages.

Are you looking to implement new sections and content that are not currently on the site?
Answer: We will not be implementing new sections. The priority is restructuring and clean-up of existing sections.

Are there any known specific features or functionality your team wants to implement?
Answer: We need to implement filter functions for existing opportunities, removing outdated links, hiding old pages, simplifying/clarifying UX navigation through the website.

The Scope of Work lists "Development - Implementing structural updates as needed". Can you provide an example of a structural update?
Answer: Structural updates would include restructuring the filtering on the "Find Opportunities" page, updating top and bottom navigation, and hiding/archiving specific pages that are irrelevant.

How many hours do you expect are needed per month on average for IIE PEER website support and maintenance?
Answer: In addition to monthly security maintenance, we anticipate up to 10-15 hours per month for first 3 months to work through backlog of projects, then approximately 3-5 hours/month of support, in addition to monthly security maintenance.

What is the expected frequency of website content updates?
Answer: After an initial work through of backlog, IIE wants to manage inputting new editorial content with the vendor supporting technical issues that may arise when adding new content. The vendor should ensure the website is easy and simple for IIE editors to make content updates when we want to.

How many support and maintenance requests for the site have been recorded over the last 12 months?
Answer: Over the last 12 months, 11 support and maintenance requests have been recorded. It is important to note that our website has been undergoing major content simplification/uploads during that time.
Do you have existing brand guidelines and/or design system?
Answer: Brand guidelines follow branding for the Institute of International Education (IIE). A brand usage guide would be provided to the selected vendor.

Can you elaborate on what needs to be included in the "updating the design and user interface" estimate for this RFQ?
Answer: For now we are looking at basic UX/UI updates/simplification, and improvements in ease of editability by IIE. This includes repairing/updating filter functionality, an update to the look and feel of the front page and other relevant pages, updating search tools, amending disorganized site navigation and problematic UX routing and refreshing the site for better user functionality. IIE is interested in a price description for general support and maintenance in addition to the design and interface updates mentioned above. IIE is interested in a price description to carry out these tasks in Drupal, as well as a price description to transfer the site to WordPress and carry out these tasks. In the future, we may wish to explore an option for a full UX/UI overhaul and redesign.

What is the likelihood of IIE wishing to re-platform the existing site to WordPress, vs. pursuing a full site redesign (and in so doing, re-platform to WordPress)? What is motivating a possible shift away from Drupal? Can you elaborate on "Potential opportunity for creative and complex redesign of the website in the future."
Answer: We are considering a move to WordPress because IIE.org is on WordPress and IIE hosts nearly all of its programs on WP Engine. A WordPress framework would allow for consistency with IIE’s other webpages. The cost to transition the entire website from Drupal to WordPress/WPEngine will be the main factor determining that decision. We are not seeking a full redesign of the website at this time. We are interested in pricing of UX/UI changes and keeping on Drupal compared to pricing of UX/UI changes with transfer to WordPress. There is an immediate need to improve the existing functionality of the website, so a complex redesign is not an immediate priority. There is potential in the future to carry out a complex creative redesign, which would depend on the cost of that project and available funding. Proposers can include their capability for such a project if they wish to be considered for the opportunity in the future.

Can you elaborate on the staff roles that need training and the approximate number of staff within each role who would need training?
Answer: Training needs would be minimal, as we want all content areas to be easily editable by IIE admin/editors. Two to three IIE staff will need to be taught the capabilities we have to make updates ourselves.
**Relationship**
Could you share insights into your team’s preferred protocols and collaborative approaches with stakeholders based on previous vendor interactions? Are there any challenges or lessons learned from past partnerships that we should be aware of?
Answer: Our team is looking for a transparent and collaborative approach to our work with our website vendor. We expect monthly updates such as task time estimates, progress updates, and communication on time estimate changes. We are looking for a vendor that is going to be mindful of our budget and work hard not to exceed it for smaller tasks. Lastly, we are looking for a vendor that will teach us the capabilities we have to make updates ourselves.

**What does a successful vendor partnership look like?**
Answer: A successful vendor would display open communication, clear timelines, transparency in billing, the technical skills necessary to complete work, and a point of contact/account manager who can remain knowledgeable of the project deliverables and able to answer questions in a timely manner.

**Can you share specific challenges encountered during your active sprints?**
Answer: Communication has been the biggest challenge.

**What can you tell us about your stakeholder landscape, including those who must be consulted for input on matters related to strategy, technology, features, and creative, as well as those who will be involved in the review and approval of any deliverables?**
Answer: IIE’s Corporate & Foundation Programs’ Senior Manager and Scholarship Management and Program Analyst will be consulted for all strategy, creative, review, and approval of deliverables.

**What is the composition of your project team? Will there be a single project manager?**
Answer: Yes, there will be a single project manager interfacing with the vendor.

**What are the requirements for a Service Level Agreement in terms of response times and/or resolution times?**
Answer: Vendors should share in their proposal what their typical response times are for general questions and for critical issues, as well as their availability and response times outside of typical U.S. working hours.
Historical

How was the current website built? Was it developed internally or by another vendor?
Answer: The website was built in 2017 by an outside vendor.

Is there an incumbent for this project who is expected to bid?
Answer: Yes, there is an incumbent who may submit a bid.

What is the nature of typical new features you have added to the website in the past? We're trying to gauge how much of this project is primarily maintenance and break/fix vs. enhancements to the existing site.
Answer: Past feature additions have included work on updating filters, navigation tabs, and translating the website into multiple languages. Not all these items have been completed and there is a backlog. Once the backlog of enhancements for filters and navigation is complete, the majority of projects would be standard maintenance and break/fix support.

Since the last redesign of the site, what strategic / messaging / branding goals have changed that need to be reflected in the new / revised site?
Answer: We don’t have any new branding that we’ll be using initially, and any updates would be discussed with the vendor.

How do you currently measure the success of your website? What types of success metrics are important to you?
Answer: Our website is successful if we see a high number of visitors/web traffic, and we receive legitimate inquiries through the website and not spam/bot inquiries.

Budget

What is the budget range/what is the annual budget cap or financial limitation for the project?
Answer: Vendors should prepare their proposed budget based on the scope outlined in the RFQ.

In the pricing for the design update, do you expect us to price the whole redesign process, or will you provide the design updates and we’ll price their implementation? Is a rate card sufficient?
Answer: We are not seeking a full redesign of the website. Bullets 2-3 under Proposed Prices are seeking a quote for UX/UI changes and implementation of those changes. We are interested in pricing of UX/UI changes and keeping on Drupal compared to pricing of UX/UI changes with transfer to WordPress. If a rate card can answer this question, that would be sufficient.

END OF AMENDMENT