THE UNIVERSITY OF THE WEST INDIES

DIGITAL TRANSFORMATION PROJECT

TERMS OF REFERENCE

CONSULTANCY SERVICE FOR A REVIEW OF THE UWI WEBSITES, REDESIGN AND TRAINING

1.   **BACKGROUND**

1.01   The University of the West Indies (UWI) has requested assistance from the Caribbean Development Bank (CDB) in financing the One UWI Digital Transformation programme. The University system's network of websites is a key component of UWI Digital transformation programme. As a digitally transformed university UWI's websites will be important digital assets to help the university system achieve its strategic goals and objectives.

1.02   A primary focus must be building an effective website ecosystem that supports the University's vision to be an excellent global university rooted in the Caribbean. This includes:

    a.   Designing and maintaining a network of websites that promotes a cohesive single UWI brand consciousness, and delivers a world-class, user-centred web presence(s) that supports the University's mission and strategic goals.

    b.   Enhancing the overall website user experience by providing a quality web experience that encourages website visitors to engage with the University system in the online environment.

    c.   Ensuring that the University's diverse audiences are able to access the information they seek easily and equally via its websites.

    d.   Assuring a high level of confidence that the information on the University's network of websites is accurate, up-to-date and fit for purpose.

    e.   Improving existing natural search traffic and ranking performance of the University's primary websites.

1.03   At present, six primary domains comprise the web presence of UWI:

    a.   Centre: www.uwi.edu
    b.   Cave Hill Campus: www.cavehill.uwi.edu
    c.   Five Islands Campus: www.fiveislands.uwi.edu
    d.   Mona Campus: www.mona.uwi.edu
    e.   St. Augustine Campus: www.sta.uwi.edu
    f.   Global Campus: www.global.uwi.edu

1.04   Each of these in turn, facilitate thousands of pages to support offices, departments and special projects and initiatives as necessary. The sites are managed by dozens of personnel within the web and marketing communications teams as well as various other offices across UWI system, using different processes. The sites may use DRUPAL and/or Wordpress as the content management system. There is

minimal integration between the domains and sharing of resources and content. They all reside on separate servers and networks.

1.05   A more functional and effective website ecosystem for UWI is reliant on three pillars:

    a.   An effective governance architecture that ensures better alignment of institutional system, structure, and policy with procedures and processes;

    b.   Harmonized/integrated business processes supported by technological systems; and

    c.   Re-focused brand management that includes the development of consistent language and a common digital/online marketing and communication approach to sustain the One UWI brand.

1.06   The One UWI Brand requires re-conceptualizing a web ecosystem that is fit for purpose. This is to be accomplished through a web presence inventory and assessment audit to create a baseline view of all UWI websites, webpages, web servers, and IP addresses, and produce a clear map of the hierarchical and relational structure of all UWI domains and subdomains, as well as the functions of these web assets. This information will provide the context to help shape other strategic decisions in relation to leveraging UWI's network of websites to enhance UWI's global presence and build greater global awareness and affinity for UWI brand. It is a first step to a larger scoping exercise.

2. <u>OBJECTIVE</u>

2.01   The objectives of the Consultancy are:

    a. An improved and effective website ecosystem for UWI to support optimal engagement and service delivery with internal and external stakeholders and clients.

    b. An improved skill set of the members of the Cross-Campus Web and Marketing Team in the area of website analytics.

3. <u>SCOPE OF SERVICES</u>

3.01   In undertaking the assignment, the Consultant will work closely with cross-campus web team members and UWI Marketing and Communications Team and report to the Project Coordinator (PC). Specifically, the consultant will:

    a.   Conduct a full inventory and assessment of UWI domain websites, including their ownership, management, and maintenance.

    b.   Conduct a full inventory and description of the business processes that each existing website supports and where duplications exist – in process and in content.

    c.   Evaluate each website's performance in relation to meeting its objectives/business process needs. This includes areas such as technical performance, search performance, usability performance, content, design, and conversion goals.

    d.   Propose recommendations for an appropriate governance structure—model and process/policy to guide the network of sites—to enable more seamless and timely processes for controlling the quality of content web updates and creating better managed and maintained websites.

    e.   Re-design and develop the new OneUWI web presence.

f.   Accessibility Plan for website which enhances the website for persons who are physically challenged.

3.02   The training targets members of the Cross-Campus Web and Marketing Teams and will be done in a hybrid mode, incorporating both theoretical and practical sessions. The objective of the training is to upgrade the skillset of the members of the Cross-Campus Web and Marketing Team in areas of website analytics. This training will assist the members of the web team to make informed decisions based on the interpretation of the Google Analytics data which each team has been recording over the past few years. The ability to accurately interpret user generated website analytics will play a critical role in refining the online presence of The UWI and sustain competitive advantage in the learning space.

The training will consist of the following components:
- Introduction to Google Analytics covering cookies, channels, tracking, conversions & measurements
- Introduction to Google Tag Manager
- Designing Google Campaigns
- Overview of Google Data Studio – Building & Scheduling Reports

Specifically, the Consultant will:

(i)   Conduct a website analytics Audit for UWI;
(ii)   Prepare and facilitate lessons on topics identified or as recommended;
(iii)   Submit training programme;
(iv)   Provide access to online library of supporting materials to participants;
(v)   Provide real-time experimental learning workshops;
(vi)   Conduct an evaluation of the training;
(vii) Provide reports on students' performance and progress; and
(viii) Report any problems, incidents and concerns relating to the programme.

4. QUALIFICATIONS AND EXPERIENCE

4.01   The consultant firm must have a minimum of 5 years experience in developing improved and effective website ecosystems and training client staff to improve the skill set of the members of their Web and Marketing Teams in the area of website analytics. The firm must have successfully completed a minimum of two projects developing improved and effective website ecosystems and training client staff to improve the skill set of the members of their Web and Marketing Teams of similar or greater complexity than the requirements set out in the Scope of Services. Any experience working in the Caribbean Region is considered beneficial and should be stated. Any experience working with universities, public bodies or on Development Bank funded projects would be an asset.

4.02   If selected to submit a Proposal, the Consulting Firm will be required to appoint a qualified team of key and non-key experts, as appropriate, to ensure the successful implementation of the assignment. The Consulting Team must include a minimum of two (2) key experts, with the

following roles, minimum qualifications and experience:

Key Expert 1 – Team Leader

The Team Leader shall possess the following minimum qualifications and experience.

a. Bachelor's degree in Computer Science, Information Systems, or related field of study.

b. At least five (5) years' experience in a web service environment.

In addition, the following knowledge and experience must be demonstrated:

a. Industry-recognized certification in the respective area of training.

b. Understanding of website planning and layout of web applications, websites, and web-related services and technology.

c. Knowledge of the higher education industry and higher education marketing and communications.

d. At least five (5) years prior experience performing reviews and audit actions for websites and online content.

e. Understand applicable regulations and policies and any other compliance aspects covering web and technology applications.

f. Strong oral and written communication skills and the ability to communicate technical information.

g. At least five (5) years prior experience in performing maintenance, administration, and enhancement of websites and web-based services.

h. At least five (5) years prior experience with process mapping and business process design.

i. Appreciation of emerging technologies to determine their relevance to the existing web environments.

j. Ability to identify changes necessary to upgrade websites and services.

k. Possession of above-average project and time management skills.

l. Ability to work with content owners and various content providers, departments and offices to map processes and solutions as necessary.

m. The Ability to perform reviews and audit actions, as well as interpret and communicate web-related analytical information regarding web-based traffic, visits, browsers, and trends, allows for decision-making processes to determine future needs and/or validate content availability and usage.

Key Expert 2 – Website Analytics Trainer

The **Website Analytics Trainer** shall possess the following minimum qualifications and experience:

a.   Bachelor's degree in Computer Science, Information Systems, Marketing, Communications, or related field of study.

b.   At least five (5) years' experience in a web service environment.

c.   Industry-recognized certification in the respective area of training.

d.   Strong oral and written communication skills and the ability to communicate technical information.

e.   At least five (5) years prior experience in performing maintenance, administration, and enhancement of websites and web-based services.

f.   Appreciation of emerging technologies to determine their relevance to the existing web environments.

5.   REPORTING REQUIREMENTS

5.01   The Technical Proposal of the selected firm shall have already outlined a work plan and approach to the assignment, the scope and methodology and a time schedule for the completion of the assignment. The Consultant will be required to submit to the Project Implementation Unit the following reports electronically in PDF format or as otherwise requested:

a.   An Initial Report no later than four weeks after the commencement of the assignment. The report should include the inventory and assessment of UWI domain websites and an inventory and description of the business processes that each existing website supports. UWI and CDB will provide comments upon receipt of the report;

b.   A Draft Final Report, two months after commencement of the assignment, which includes the evaluation of the performance of each website and recommendations for an appropriate governance structure. UWI and CDB will provide comments upon receipt of the report; and

c.   A Final Report, incorporating the feedback received two (2) weeks after final sign-off.

6.   DURATION

The consultancy assignment is expected to require a maximum of 60 person-days over four months duration.