

University of New Mexico Press

STREET ADDRESS & SHIPPING

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UNM MAILING ADDRESS

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July 28, 2014

Dear Vendors:

You are invited to submit an offer to design a new website for the University of New Mexico Press (UNMP) in accordance with the requirements and specifications identified in the attached project outline. Please read carefully all instructions, specifications, requirements, scope of work, and terms and conditions. Failure to comply may result in your offer being disqualified. Offers must be submitted electronically to the following address no later than October 1, 2014, with the subject "UNMP Website Project":

[UNMPRESS\\_RFP-L@UNM.EDU](mailto:UNMPRESS_RFP-L@UNM.EDU)

The Press is an academic department within the University of New Mexico in Albuquerque, New Mexico, and is one of approximately 135 university presses in operation today engaged in scholarly publishing. The Press was founded in 1929, publishes about 75 new titles a year, has more than 1,200 titles in print, and is the largest book publisher in the State of New Mexico. The Press's major trading partners are Amazon, Barnes & Noble, Baker & Taylor, and Ingram plus many independent and local retail bookstores, college bookstores, public and private schools, national parks and museums, as well as individuals. Books can be purchased directly from the UNMP's website, which also serves as a major source of information about the Press and its products as well as for prospective authors.

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A handwritten signature in black ink that reads "John W. Byram".

John Byram  
Director

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## I. DEFINITIONS

The Cat's Pajamas – A software suite designed to streamline accounting functions in the publishing industry. It focuses on inventory and sales accounting functions.

Featured Sections – These sections of the website will promote Works for a certain category, such as new releases, and allow for end users to click on links forwarding them to book pages, a preview of the work, and/or directly to add it to the cart. These sections will have various book metadata linked to and coming from the PressWorks database and have the layout and functionality more hardcoded, so that not much creative design or technical knowledge is needed when applying updates.

Free Flowing Featured sections – Same as “Featured” but may or may not be linked to PressWorks. These sections will have more freedom for creative design through the website CMS.

PressWorks – A book publishing software suite built on top of FileMaker database software. It is designed to administer Works and Products and is focused on title management for bringing books into production and recording the life of the product and contributors involved.

Products – The product level of a Work that is available for sale and can consist of various formats/bindings (Paperback, Cloth, Spiral, E-book, etc.).

Vendor or Offeror – The potential vendor to work with University of New Mexico Press (UNMP), unless otherwise stated.

Works – The creative work of a contributor (Author, Editor, Photographer, Artist, etc.) that is refined for sale. It is determined at the title level of the project, where the Product outlines the multiple formats in which the work is available.

## II. INTRODUCTION

### 1. Project Requirements and Specifications:

Our website resides at: <http://unmpress.com/>

Find a copy of this document at: [http://unmpress.com/RFP/website\\_project.pdf](http://unmpress.com/RFP/website_project.pdf)

The current website needs to be redesigned and the integration between the databases and pages will need to be restructured.

Website Objectives:

- 1) Provide branding and information about UNMP.
  - The website will attractively communicate informative data about UNMP, its mission, employees, Products, Product's contributors, distributed partners and their Products, rights and permissions, ordering, calendar events, and author services.
- 2) Product sales.
  - The website will provide ecommerce functionality to market and sell UNMP and distributed partners' Products.
  - It will provide information about ordering Products that are not sold on the site (e-books).
- 3) Provide author manuscript submission support.
  - The site will provide information for authors about the manuscript submission process.
  - The site will provide an interface for authors to submit their contact info and ideas to Production staff.
  - The site will create an author informational hub that guides them through the UNMP submission process.
- 4) Fundraising.
  - The website will provide information on how to support UNMP and create an inviting way for end users to donate.
- 5) Access to Works content.

- The website will incorporate a preview of our Works.

### III. SUMMARIZED REQUIREMENTS OF VENDOR

1. Excellent graphic design capabilities.
2. Expertise in user-centric modeling for website design.
3. Information architecture proficiency focused on database(db) integration.
4. Ability to create CMS designs; ability to execute in Drupal is preferred.
5. Experience with programming/theming and collaborating with in-house designers.
6. Ability to create a compelling visual language and style incorporating a variety of media (video, photos, pdfs, etc.).
7. Ability to design for mobile platforms preferred.

### IV. TECHNICAL SPECIFICATIONS AND SCOPE OF WORK

UNM Press needs a redesigned website and storefront that is designed consistently in collaboration with the UNM Press Marketing and Design departments. A unified design allowing intuitive and easy navigation by readers, authors, and researchers is required; the visual “framework” and navigation strategy need to accommodate the different users while maintaining the same look and feel of the UNM Press brand. The UNMP databases must be integrated for easy administration of displayed Products’ data, and for proper sales functionality. Each subset will have its own collateral needs.

Group collaboration meetings between select UNMP staff and vendor are essential in determining directions, scope of project, and reviewing options but ultimately the vendor will work with one main point of contact at the Press.

1. Proposed Website Sections (subject to change)
  - a. Featured on Homepage (Marketing / Advertising Sections)
    - 1) New Releases Banner Section / Featured Section – links to New Releases Books page
    - 2) Three other Free Flowing Featured sections
      - See section IV.4.c.
  - b. Menu Sections
    - 1) Home – In Menu Section and/or on logo (links back to homepage)
    - 2) Books
      - New Releases
      - Awards
      - Series
      - Distributed Clients
      - E-books
      - Catalogs
      - New Mexico Textbooks
        - Featured Textbooks
      - How to Order
        - Ordering Page
        - Exam/Desk Copies and Review Copies
        - Sales Rep Contact page
        - Info for Individuals
        - Info for Booksellers
        - Info for Educators
        - Info for Libraries
      - Rights Section
        - Rights and Permissions
          - Will contain online forms, see section IV.9.
          - Should contain link for copyright education, 3<sup>rd</sup> party link.
        - Featured Foreign Rights
        - Featured Audio Rights

- Featured Film and TV Rights
    - Featured Backlist Foreign Rights
    - Featured Best Sellers
  - 3) News
    - Author Calendar
    - Exhibits Calendar (possibly combine calendars)
  - 4) About Us
    - Contact Us
    - Support UNM Press
      - Eye catching support button linking to UNM support page. Why support? Ideas for giving (naming series after, others).
  - 5) For Authors Section
    - Prospective Authors
      - How to submit manuscripts, contacts, and forms.
      - Will contain online forms, see section IV.10.
    - Contracted Authors
      - Prepping manuscript for final submission, prepping illustrations, prepping securing permissions, etc., contacts, forms.
    - Authors Handbook
      - See section IV.11.
    - Marketing Information for Authors
  - c. Subsections on home page – Not a part of the menu
    - 1) Social media feeds and links
    - 2) Resources Section
      - Authors
      - Media
      - Rights
      - Ordering
    - 3) Support Us
    - 4) Current Catalog
  - d. Header and Footer – to be worked out during design phase.
  - e. Book Page (Works Page)
    - 1) Fields: title, subtitle, contributor (display hierarchy is a factor), description, contributor biography, specs, pub date, series, volume, subject, ISBN, price, format, “Add-To-Cart” button; sometimes customer service contact information.
    - 2) The Products will be displayed differently depending on different attributes. For example the display will be different if a book is coming soon versus a book that is for sale on the site. Deeper explanation will be covered in the design phase of the project.
  - f. Checkout Page
    - 1) Pre-Checkout Landing Page – there will be a pre-checkout landing page where the patron has an opportunity to enter in a promotional code, and also see instructions for international ordering.
      - See section 13 about sale function.
    - 2) Checkout Landing Page – the checkout page will summarize the patron’s order and allow them to update it. It will then transfer them to a secure checkout method when they are ready to checkout.
    - 3) PayPal Checkout – We are contracted with the University to use PayPal as our approved checkout system supplier. We prefer to continue to use this system, unless it can be justified and approved by the University to change the checkout system supplier.
  - g. Advanced Search
    - 1) Search Results List
      - See section IV.7 about search functionality.
2. Website Technology
- a. Current setup is based on a LAMP stack environment. We will require sever-side scripting language(s) to code the site. Client-side languages such as JavaScript are not ideal because of security holes and its reliance on end users’ browsers for functionality. Possibilities for approved languages include, but are not limited to, PHP, Perl, or CGI.
  - b. We expect the site to handle HTML tagging that is pushed into fields that are displayed in areas on the site.

- c. Our db type is MySQL. We are not opposed to changing the type, but certain criteria must be met in order for that to happen. This is outlined in section 3 below.
  - d. Incorporation of Cascading Style Sheets (CSS) is recommended to help with standardization of the look of the site.
3. Integration of Publishing Software Database and Website Database.
- a. UNMP Product information is managed through two separate software programs. In hierarchal order, The Cat's Pajamas (the Cat) db pushes significant Product data to the PressWorks db. PressWorks then pushes data into the "backend" website MySQL db through SQL queries. Separately there is another "frontend" MySQL db that governs the website menu, homepage, and other pages located in the menu.
  - b. Changes to the db type will be considered if:
    - 1) Approved by UNMP IT Management.
    - 2) Cost effective.
    - 3) Can be administered by UNMP IT staff.
    - 4) Can be understood by PressWorks developers/support team.
    - 5) Updatable through PressWorks scripts that are at a minimum equally effective and timely.
4. Integrate PressWorks as a CMS
- a. Currently there are several fields in the PressWorks db that push data directly out to the website db. For example price and status of Products change frequently and will need to reflect this on the site. The scripts to push these fields are all done with SQL queries through a MySQL ODBC system DSN connection.
  - b. The updates to the new db will at a minimum need to meet the speed and capabilities of the current process.
  - c. Not in place right now is the ability to update "Featured Sections" in the website. We will require that there is an easy way for nontechnical staff to update the books that appear in the featured sections and other pages or listings throughout the site.
5. Hosting
- a. Currently the site is hosted through HostGator hosting services. Changes in Hosting Services will be considered if:
    - 1) Approved by UNMP IT Management.
    - 2) Cost effective.
    - 3) Can be administered by UNMP IT staff.
    - 4) Has equal if not better security protocols protecting the site, db, and the transfer of data.
    - 5) Has an equally effective and proven backup service that can be administered by UNMP IT staff.
    - 6) Provides comparable services and support currently provided.
6. Provide a Content Management System (CMS)
- a. The majority of updating will be done through PressWorks into preformatted pages and sections. For free flowing featured sections, other areas/pages that are not preformatted, and hybrid areas, we will require a CMS be provided.
    - 1) A requirement of the CMS is to integrate the main web db with the PressWorks db. This is so data stays consistent, and the UNMP staff member updating does not have to recreate data in two places.
    - 2) The CMS should be built on, or have features and options similar to well known existing CMS – examples: Drupal, WordPress, Joomla, Concrete5. Drupal is preferred.
    - 3) The CMS should incorporate CSS to standardize pages.
    - 4) The CMS should be user friendly for nontechnical personnel.
    - 5) The CMS interface should be able to support the upload and display of video, image files, pdf files, documents, and other popular file types.
    - 6) A developed style guide should be outlined and implemented into the CMS options along with options for changing it as needed.
    - 7) The CMS should be able to create links, buttons, scrollable objects, display boxes, and other commonly used tools and display features.
    - 8) It should be able to show the source code and allow for its manipulation.
    - 9) It should provide a preview option before going live.
  - b. Provide Training
    - 1) See IV.4.b and IV.4.c.

7. Diacritic Handling
  - a. UNM Press uses various diacritics from different language types (Spanish, German, Eastern Europe, Navajo, and others). The site will need to be able to display all diacritics without error in the way the character is meant to be displayed, and not by changing the character with a diacritic to a character without a diacritic.
  
8. Provide Proper Search Functionality
  - a. Search functionality should primarily focus on a keyword type search. This search should be intelligent enough to bring forth the titles of Works that are exactly or close to the keywords entered into the search area – displaying titles that first exactly match then keywords then go to words that are less common and more distinct to the keywords provided, excluding articles.
  - b. Besides keyword searches, there should be Advanced Search options. These searches will allow for searches based on specific sections: keywords, author, title, ISBN, publisher, subject, and series. Good examples of how Product searches should function for books is Amazon.com:Books and Booksinprint.com.
  - c. Collaboration and final approval of the search function will be completed with our Marketing staff.
  
9. Previewable Works
  - a. This requirement is specifically for Works containing images and/or words. The preview should be set not to display more than a certain percentage that would give out too much of a Work. This limit will be worked out later during the design phase. Most of our titles are previewable with Google books service, and incorporating them with that applet will be sufficient. The incorporation of this service should be written into the code so that the preview displays dynamically. In other words, when updating or entering new Works data the Preview should appear automatically.
  
10. Online Forms
  - a. For the Rights and Permissions, For Authors sections, and possibly other sections, we would like online forms to be created. The main purpose of these forms will be a template for sending an email to various staff. These forms may require an attachment to be placed into the “form,” which should be sent as an email attachment and not contained in the email body. We do not necessarily need to take Personal Identifiable Information (PII) at this time, but we want the secure infrastructure in place in case we need it in the future.
  
11. For Authors Section, Authors Handbook
  - a. The Authors Handbook explains how Authors should submit their Works. This PDF document is being rewritten and condensed. After that is completed, we want to make it available online as an interactive reference – not a pdf file. Easy navigation and readability is the goal. It may contain links to forms.
  
12. Products Display
  - a. Our Products are to be displayed based on conditions of specific elements. The fields that govern this are: Products’ status, format, and quantity on hand (QOH). Conditions are summed up here: This is not meant to be exact code for programming:
    - # IP, MD, NP and TP are PressWorks statuses.
    - If (QOH >5 && Status==IP or TP)  
display (add to cart)...
  
    - If (QOH <5 && Status==IP or TP)  
display “Item is temporarily out of stock: Contact Customer Service at 1.800.249.7737 to order.” (NO CART)
  
    - #MD is print on demand so QOH does not factor in
    - If (Status==MD)  
display (add to cart)...
  
    - #NP is coming soon status, but may sometimes have a quantity available to sell
    - If (QOH <5 && Status==NP)  
display “Coming soon: Contact Customer Service at 1.800.249.7737 to preorder.” (NO CART)
  
    - If (QOH >5 && Status==NP)

display (add to cart)...

#For e-books, it depends on Format not QOH and Status. Link will be to E-books page.

If (Format ==E && Status==NP)

display "Coming soon: "Click here for e-book Ordering" (NO CART)

If (Format ==E && Status==IP)

display "Click Here for e-book Ordering" (NO CART)

#all other statuses (OI, OP, RF)

Else ()

(Suppress from website...)

### 13. Website Sale Function

- a. The website will provide a sale function to put Products up for sale under certain conditions. For every sale condition there are certain titles that will always need to be excluded from the sale and that list must also be updateable. We exclude by ISBN currently. There are also sales that we want to include only certain titles.
- b. Sale conditions:
  - 1) All Products are on sale at a certain percentage off of the list price.
  - 2) Coupon code used to put Products on sale at a certain percentage off of the list price.
  - 3) Coupon code to put only select Products on sale.
  - 4) All Products sale and coupon code sale in conjunction. The discount percentage will be calculated by adding the All Products percentage to the coupon code percentage to equal total percentage. The sale price is then determined by subtracting total percentage from list price.
  - 5) All Products sale in conjunction with coupon sale, where sales are separate (each sale type takes off a different percentage).
  - 6) Multiple coupon sales based on different code congruently active. Sales may include all or only specific titles. All Products sale may also be active to incorporate an additional discount or exclude the All Products sale.

### 14. Integration with Museum of New Mexico Press (MNMP) website.

- a. A page containing a delimited list of MNMP ISBNs and IDs (if IDs are displaying the Book pages, integration may take a different approach).

### 15. Viewable Across Platforms

- a. It is required that our site display correctly and be functional across all popular browsers and with every computer, tablet, or mobile device, without error. Popular browsers are, Internet Explorer, Safari, Firefox, Chrome, Opera, and any other browser that may become popular that uses similar technology.

### 16. Search Engine Optimization (SEO)

- a. When building the new site, SEO will be critical for bringing in the most traffic as possible to the site when trying to search for our organization as well as when searching for our Works at a Product level.
- b. Suggestions for adding keywords or the use of other techniques to optimize search engine visibility will be welcomed when considering UNMP Works metadata.

### 17. Security

- a. When designing the site, security of the site must be thoroughly worked out. Measures will be taken to prevent as much as possible: hacking into the site code and database, corruption of data, code, architecture, or functionality, piracy of Products' content, illegal entry into site administration systems, and tapping into traffic or databases that may contain PII or other significant data.

### 18. Backup and Recovery

- a. Currently our site is backed up with CodeGuard Cloud Backup via HostGator. This is a proven and relatively quick and easy backup/restore process. We expect to keep the same process or match its capabilities.



## V. PROJECT MANAGEMENT AND DELIVERABLES

1. Phase 1 – Submission and Selection of Offeror
  - a. See section VI. for guidance.
2. Phase 2 – Contract Phase
  - a. After completion of phase 1, a contract will be constructed and signed in accordance with University Purchasing Department guidelines and policies.
3. Phase 3 – Design and Production Phase – Day 1–120
  - a. After completion of phase 2, work will begin. In this phase the vendor will work closely with UNMP Marketing and Design management and staff to collaborate on the design of the website. The vendor will have a thorough understanding of the technical requirements and have a senior level of design experience in creating web-based environments.
  - b. Simultaneously, while the design and flow of the site is being worked out, the database aspects will be worked out with UNMP IT staff and PressWorks support staff.
  - c. Prior to going live with the unmpress.com site, everything should be worked out inside a test environment to minimize downtime and errors.
  - d. Integration of checkout with Museum of New Mexico Press (MNMP) website worked out.
  - e. Training will be provided on how to use the new CMS.
  - f. Backup and recovery process completely tested and systems administration of the website training provide to UNMP IT staff.
  - g. Deliverables:
    - 1) By Day 90: Test environment to be delivered in 3 parts
      - A mockup of what is to be the new unmpress.com website.
      - Fully accessible to UNMP IT staff.
      - Fully integrated with PressWorks database.
    - 2) By Day 90: Backup and Recovery
      - A proven automated backup process will be provided per requirements above in III.18, and training for administration of the backup and recovery process will be covered in the Systems Admin Training session.
    - 3) Day 91–110: Training
      - Training will be provided in a webinar type course or in person at a UNM Press facility. This training can be conducted so that all staff members are trained at once. Depending on the complexity of the CMS, training sessions can be scheduled for more than one session, until all features and options have been covered during the training, and all questions answered for UNMP staff.
      - Training will be provided for at least 5 UNMP staff members.
      - A training guide for using the CMS will be provided during the course and given to UNMP staff for reference after.
    - 4) Day 111–120: Systems Admin Training
      - Training will be provided in a webinar type course or in person at a UNM Press facility. This training can be conducted so that all IT staff members are trained at once. Depending on the complexity of the systems admin process, training sessions can be scheduled for more than one session, until all topics have been covered during the training, and all questions answered for UNMP IT staff.
      - Training will be provided for select UNMP IT staff members not exceeding 5 personnel.
      - Reference guides and helpful reference links should be provided.
      - All administrator credentials will be provided along with all server connections settings.
4. Phase 4 – Day 120–150
  - a. Go-Live Phase
    - 1) Day 120–135: After completion of Phase 3, the Go-Live date will be coordinated with UNMP IT staff and PressWorks support staff in order to point the db queries to the correct server and to support any other necessary changes.
    - 2) Day 120–135: Coordinate with UNMP IT staff to check proper setup for integration with MNMP website.

- 3) Day 135–150: The vendor will be on standby during normal business hours, Monday through Friday, 8 AM to 5 PM, MST for 2 weeks after the Go-Live date.
  - 4) Deliverables:
    - Copy of the unmpress.com website files.
    - Complete access to the unmpress.com website and all administrative credentials and settings provided for live site.
    - Backup and recovery process changes, fully explained to UNMP IT staff.
5. Phase 5 – Day 150–210
- a. Support Phase – Day 150–210
    - 1) After the site is live, support for the website will be required for 6 months.
    - 2) After the initial support period, additional continuous support will be provided at an agreed upon fee and for an agreed upon duration, if needed.
    - 3) Errors discovered in the original coding will be fixed without fee for the life of the site, as long as updates to external technologies do not influence the error.
      - These errors include, but are not limited to:
        - Display,
        - Functionality,
        - Integration,
        - Security.
    - 4) Support includes monitoring and improving aspects for reaching the highest levels of SEO at a Products level.
    - 5) Support will include minor display improvements and changes outside the capabilities of the CMS provided.

## VI. SUBMISSION OF OFFER/PROPOSAL FORMAT

### 1. Format

Offerors should organize proposals in the order as stated in this section. Submissions must be organized to include the following information:

- 1) Name, address, e-mail address, telephone numbers, and facsimile number of the Offeror and primary contact.
- 2) A signature of the Offeror or of an officer/employee who certifies that he/she has the authority to make the Offer.
- 3) A statement by the Offeror, if awarded the contract, that he/she will comply with the contract Terms and Conditions as set forth in the project outline.
- 4) Description of the prior experience and qualifications related to accomplishing the Scope of Work as described in the Project Outline. (This portion of the proposal should demonstrate the extent to which the Offeror is qualified to perform the Scope of Work.)
- 5) Description of the experience and qualifications for the specific individuals who will provide the services.
- 6) Narrative description (500 words/2 pages or less) of other website projects similar to UNMP's the Offeror has designed with particular emphasis on problems faced and how those challenges were successfully overcome.
- 7) Description of the training that will be provided to UNMP to administer the website once the project is completed.
- 8) Description of the support that will be available to UNM Press after the website becomes operational to include fixes, modifications, changes, maintenance, costs, and response time.
- 9) Detailed cost proposal for providing the services requested. Please itemize fees, expenses, and optional costs separately. (UNM reserves the right to negotiate the final fees and cost.)
- 10) A list of references that identifies institutions the Offeror has successfully served in the past along with a brief description or examples of the work performed. Include phone numbers and email addresses of individuals who can attest to the Offeror's experience and qualifications relating to the services requested. References must be familiar with the Offeror's work within the past three years.

2. Evaluation Criteria

The Offerors' proposals will be evaluated and points will be given as shown below in the evaluation criteria.

<u>DESCRIPTION</u>	<u>MAXIMUM POINTS</u>
Price .....	100
Design .....	80
Technology/Operations .....	80
References .....	80
Schedule .....	60
Training .....	50
Support/Warranty .....	50
Total	500

3. Evaluation Process:

- a. The evaluation committee will score each proposal and prepare a selection recommendation report for the Director of UNM Press or his/her designee recommending in order of preference the Offerors considered to be the most qualified. The Director of UNM Press or his/her designee are authorized to negotiate with Offerors on this list and a contract will be awarded to the responsible Offeror whose proposal represents the best value and is in the Press's best interest.
- b. Selected Offerors may be asked to meet with UNM representatives to discuss their proposals in more detail including their cost estimate, design concept, technical solutions, references, timeline, training and support, and warranty.

4. Contract Award:

The final award decision shall be made by the Director of UNM Press or his/her designee. The selection authority will review the recommendations of the evaluation committee and shall, with the advice and appropriate technical and staff representatives, make the final decision.

5. Submissions are due to:

[UNMPRESS\\_RFP-L@UNM.EDU](mailto:UNMPRESS_RFP-L@UNM.EDU) no later than October 1, 2014 with subject line "UNMP Website Project."