Request for Proposal

# City of Pinole, CA
# Website Content Management System (CMS) Solution

City of Pinole
2131 Pear Street
Pinole, CA 94564
Phone: (510) 724-9830



## Submittal Requirements

The deadline for RFP responses is March 9, 2023 no later than 4:30 p.m. (PST). Submit a PDF of the response with the subject line "City of Pinole Website CMS Solution RFP" to:

Fiona Epps
Assistant to the City Manager
E-mail: fepps@ci.pinole.ca.us

## Inquiries

Inquiries regarding this Request for Proposal must be submitted via email and directed to:

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Assistant to the City Manager
E-mail: fepps@ci.pinole.ca.us

## 1. Background

The City of Pinole is looking for a highly functional content management system (CMS) that is designed for local governments to deliver specialized content and a broad range of integrated online services which continuously enhance citizens' experience when visiting our website. It is equally as important that the CMS meets ease of use criteria for administrators and content editors of any experience level.

Pinole is a City of approximately 19,318 residents that has a small town feel albeit located in the San Francisco Bay Area. The City operates a total of 7 locations which consist of 8 main departments: City Clerk, City Manager, Community Development, Community Services, Human Resources, Finance, Police, and Public Works. We work under the Council-Manager form of municipal government. The City Council is comprised of five members elected at large to four-year terms, and the mayor is rotated amongst the council on a yearly basis.

Our current website is currently hosted by a proprietary cloud-based CMS platform. The website is oftentimes the first interaction that people have with the City of Pinole. On the homepage, visitors can use quick links to access commonly searched items or go directly to recent news and a calendar of events. Visitors can use menus to find information by department, or they can use the search field to find information by key words. The website has been designed to deliver information and services, such as booking appointments, reserving facilities, downloading documents, submitting forms, making payments, and contacting City staff. The City uses third-party platforms accessible via hyperlinks for services because there is no integration available. Google analytics is used to track web traffic but we wish to further utilize the data to provide basis for strategic sitemap organization.

Each department maintains its own set of pages. Within each department, there is one or more designated content managers who are responsible for updating content on those pages. We use drag and drop portlets to add different sections of information, such as calendar, forms, documents, and most commonly, content. The website is updated 2-3 times per week as City staff will add meetings, permits, reports, events, news, videos, and more. Council meeting videos are pre-recorded then uploaded as an MP4 file in the form of a hyperlink. Some content (text, tabs, quick links) is auto-adjusted to mobile viewing compatibility but other content (tables, images) is not.

Lastly, the City of Pinole website is undergoing sitemap revisions, minor design changes and content updates. We aim to hire a website company that will migrate relevant content to a new CMS, as opposed to City staff re-building new content from scratch.

## 2. Project Description

The City of Pinole would like to migrate its existing website to a new and improved open-sourced or proprietary CMS platform of which we will have the option to manage ourselves. The purpose of moving to a new CMS is to be able to easily engage citizens, improve navigation and information finding, streamline processes, and offer a broader range of online services, which will result in an overall better user experience (internal and external).

We seek to empower staff to easily manage, edit, update, and publish content and develop new pages that can incorporate a variety of features. Therefore, the CMS must be designed for easy content management with minimal steps and processing time. It is imperative that the new CMS offers robust training and responsive support programs.

To offer the public seamless online services, the chosen CMS must be able to integrate with outside software and applications. The goal is to provide the public with an easy, aesthetically pleasing, centralized means to handle City business online while maintaining security, ADA compliance, and language translation for site visitors.

We also expect the ability to scale, including the ability to add additional subsites with unique URLs and users without adding any additional cost. The City seeks the assistance of an experienced company that can accomplish the goals of the City with all the functionality identified in this RFP.

We desire a vendor to perform the related professional services (e.g., best practices guidance, training, project management, implementation, integration, and report development) in a timely and professional manner. We prefer the vendor provide website migration experts who've experienced successful implementation at comparable municipalities with similar requirements. The vendor shall have experience in successfully implementing the proposed solution at local government agencies of similar size.

The awarded vendor shall be responsible for the final City approved design, development, migration, configuration, testing, and implementation of the CMS, including end-user training and support beyond go-live. The experienced vendor should have a team of experts who understand local government, to help us achieve our vision – all while providing 24/7 support.

## 3.  Required CMS Features

We are looking for a comprehensive website CMS to be used by City staff which will provide an integrated and user-friendly experience. This section of the RFP will cover a general discussion of the overall, high-level requirements of the desired CMS. Proposers should use these high-level requirements to define an overall scope of work to include in the proposal.

**Overall System Features**

- Stand-alone cloud-based CMS with hosting option (hosting preferred)
- Flexible, role-based user permissions allowing for the assignment of unique permission actions across groups of users or individual users
- CMS availability for integration with existing software and additional applications
- Ability to create subsites with unique URLs at no additional cost
- Unlimited users and unlimited storage included
- Built-in archive solution for historical records
- Auto-adjusts to mobile-friendly platform
- 99.9% uptime

**Intuitive Navigation**

- Designed to allow easy flow from one page to another
- Sitemap structure and menu titles that enable the public to quickly find what they are looking for
- Option to add/use buttons, quick links, graphical elements, hyperlinks and secondary menus
- Clean, structured menus with action-oriented and/or simply descriptive menu titles

**Search function**

- Robust search engine for both internal and external users
- Curated search with suggestive word search (auto-complete) and synonym recognition

**Fast Loading Speed**

- 3 seconds or less for page loading
- 3 seconds or less for content publishing

**Unique and Attractive Homepage**
- High-definition images
- Customizable theme which matches the City of Pinole's branding guidelines
- Contains news and events highlights
- Contains customizable quick links for most frequented pages/information

**Meetings, Data & Archive Solution**
- Integrates with Agenda and Minutes Management Software (AMMS)
- Allows the public to find and view council meeting records (past and upcoming)
- Cloud-based data archive solution

**Online Services & Cross-platform Capability**
- Built-in online services for making appointments, reserving facilities, applications, payment of fees, and issue reporting
- Built-in service request system (request work ticket)
- Ability to integrate with Trakit and other software applications
- Ability to integrate with payment modules or have a compatible built-in payment module

**Online Marketing Tools**
- Built-in resident engagement tools, such as a newsletter, polls and survey
- Ability to securely collect and store subscriber contact information
- Ability for subscribers to select preferred notification methods is a plus
- Customizable pop-ups and notification banner with the option to set an auto-expiration date
- NotifyMe or comparable integrated application which allows website visitors to sign-up for text and/or email notifications and alerts

**Social Media Feeds**

- Ability to embed live social media feeds: Facebook, Instagram, and Twitter

**Image Library**

- Built-in library of free stock images that is updated regularly
- Built-in icon library that is updated regularly

**Analytics**

- Site analytics with statistics and reporting platform

**Fee Calculator**

- Customizable, built-in fee calculator for payments

**Security**

- 100% https & SSL certified and encrypted
- PCI compliance for payments
- Immediate threat notification
- Back-up and disaster recovery plan

**Language & Accessibility**

- Language translation availability
- ADA compliant with automatic accessibility checkers/alerts

## 4. Optional CMS Enhancements

The features below are not required by the City at this time, however, please include information and availability of integration in the future.

- **Single-edit Documents** – updating a document in one location will auto-update the same documents on all page locations
- **Calendar Sync** – website calendar syncs to external calendars i.e. Outlook
- **Live video streaming capability –** for council meetings
- **Large file Storage -** Image & video file (large file) data storage option
- **Intranet –** private, internally shared file and communication network

## 5. Format for Proposal

The City of Pinole will evaluate vendor experience, qualifications, and capabilities for developing and implementing a new CMS. The response should be formatted to address all items outlined

below. Responders are required to submit 1 of the Proposal via email. The proposal shall include the following:

**Cover Letter**

- Proposer's legal name and corporate structure
- Proposer's primary contact to include name, address, phone, and email
- Signature of a company officer empowered to bind the vendor to the provisions of this RFP

**Table of Contents**

- All pages should be numbered, and the table of contents should identify each major section.

**Executive Summary**

- Provide a concise synopsis of vendor's proposal and credentials to deliver the services sought under the RFP.
- Explain how the proposed solution will differentiate itself from other vendor solutions and the reasons the City should select the proposed solution.
  - This may include a list of the unique features which give the vendor a competitive edge in the agenda management system market.
- Present a brief description of how your AMMS meets the needs outlined in the RFP.

**Company Profile**

- Company overview
  - Brief company history, highlighting your experience working with local governments
  - Legal name of company
  - Length of time the company been in business
  - Number of current employees
- Name, telephone number, and email address for the main point of contact during RFP process

**Project Team**

- Name and define the different roles in your company's project team
- Explain how your project team will communicate with the City and keep track of the development progress
- List any specific team leaders, including
  - Name and title
  - Description of role
  - Qualifications and experience

One-source vendors are preferred. If utilizing subcontractors for any portion of the project including engineering, design, or support, provide key personnel and company information.

**Experience**

- Minimum of three municipal references with projects similar in nature to the scope of the requirements described in this RFP. Provide the following information for each:
  - Client name
  - Website URL
  - Client contact person and title
  - Phone
  - Email address

**Features & Functionality**

- Provide detailed responses indicating how your solution can meet each of the listed features and functionality provided in Section 3. Required CMS Features
- Detail availability of the features listed in Section 4. Optional CMS Features
- Identify and describe in more detail specific functionality or recommended modules or services the proposer recommends
- Describe integration capabilities including direct integrations which exist and availability for potential integration

**Implementation Plan**

- Provide a sample timeline outlining major activities, tasks, deliverables, and resources
- Detail your overall implementation approach to ensure a successful go-live
- Describe the consulting or other professional services offered by your firm during implementation to ensure Pinole receives best-practice advice and guidance and to ensure the AMMS is configured to meet the processes and project goals
- Explain your training approach and how you ensure users are prepared
- Outline your strategy for training future employees to use the AMMS

**Ongoing Support and Hosting Services**

- Describe ongoing support processes, procedures, and methods. At a minimum, the description should identify hours of support, methods to access support, after-hours support, including any support available to individual users, response time commitments, and escalation procedures.
- The City of Pinole prefers cloud-based solutions. If proposing a cloud-based solution, include:
  - Describe the proposed hosting services and associated ongoing service level commitments
  - Describe any storage limitations on the amount of data to be housed

- o Describe any restrictions to how long data can be stored
- o Describe security, backup, and disaster recovery processes and procedures
- o Describe software release/update frequency and procedures to perform updates
- o Confirm the City retains ownership of its content and will be able to export, download, or otherwise obtain a copy of the data at the conclusion of the agreement
- If proposing an on-premise solution, include:
  - o Describe the CMS release/update frequency and procedures to perform updates
  - o Technical specifications for the software including server requirements
  - o Describe any additional software/hardware required, including desktop software and plug-ins
  - o Any additional costs and processes required to run a development environment and/or disaster recovery server

**Investment Proposal**

Comprehensive pricing is required. Pricing should include:
- Development and implementation, including:
  - o Licensing for an unlimited number of users
  - o Any required hardware
  - o Any required 3$^{rd}$ party solutions
  - o Access to available API's
  - o System design and configuration
  - o Consulting services
  - o Training services
  - o Ongoing support and maintenance
  - o Additional optional enhancements
  - o Travel (if required)
- Annual services, including:
  - o Hosting & security
  - o Maintenance
  - o Technical Support
- Cost for future upgrades

Fees
- Total first year cost (combined one-time fees and first year annual fees)
- Annual fees beginning year 2

Separately list any optional project enhancements that you believe will benefit the City's project.

Additional Products Offered (limited to one (1) page)
- Give brief descriptions of other products offered by the company. Do not include marketing brochures, promotional collateral, or excessive non-relevant information.

**Proposed Legal Agreements**

- Vendors must include a draft of the proposed legal agreement(s) for the project including any proposed software licensing, hosting, professional services, maintenance, and support agreements. The proposed legal agreement(s) may serve as the basis for contract negotiations, or the City may elect to use its own agreement as the basis.

**Additional Information**
- Include any additional information the City should consider such as identifying if there are solution user groups and/or user conferences available to the City staff, ongoing training opportunities provided, or how the proposer incorporates client feedback into the CMS roadmap

# 6. Schedule

The approximate RFP schedule is summarized below:

Proposals will be received by the City of Pinole via email to fepps@ci.pinole.ca.us

| | |
|---|---|
| Request for Proposal Issued | February 21, 2023 |
| Deadline for Written Questions/Comments | February 27, 2023, 4:30 p.m. |
| Response to Written Questions/Comments | March 3, 2023 |
| **Deadline for Submitting a Proposal** | **March 9, 2023, 4:30 p.m.** |
| Vendor interviews and refence checks | March 9 – March 17, 2023 |
| Vendor approval, enter negotiations, execute a professional services agreement | March 22, 2023* |
| CMS Implementation Start Date | March 23, 2023* |
| CMS Training | July 2023* |
| CMS Live Date | August 1, 2023* |

* Dates subject to change

Questions regarding this RFP should be directed only to Assistant to the City Manager, Fiona Epps.  fepps@ci.pinole.ca.us

# 7. Submittal Requirements

The deadline for RFP responses is March 9, 2023  no later than 4:30 p.m.

**[Email Submittal]** Submit one, electronic file (.pdf file preferred) via email to: fepps@ci.pinole.ca.us .  Indicate in the subject line **"City of Pinole Development Agenda and Minutes Management Solution RFP".** The City will only accept attachments up to 10MB.

Submittals not received on or before the specified deadline stated above will not be accepted (no exceptions). Proposals submitted in response to this RFP shall be valid for 60 days from the

submittal due date. The City reserves the right to request follow-up information or clarification from vendors in consideration. Vendor is responsible to ensure delivery by the date and time included.

The City reserves the right to reject any or all submittals, to compare the relative merits of the respective responses, and to choose a vendor, which will best serve the interests of the City.

Each response to this RFP shall be done at the sole cost and expense of each proposing vendor and with the express understanding that no claims against the City for reimbursement will be accepted.

## 8. Evaluation Criteria

Responses to this RFP will help the City identify the most qualified vendor and will be indicative of the level of the firm's commitment. The City will evaluate the qualifications, references, overall fit with City of Pinole, as well as take into consideration the proposed scope and pricing submitted to determine the most qualified web vendor. Other factors which may contribute to the selection process include but are not limited to:

- Project approach and understanding of the City's objectives and requirements
- Supplier's implementation methodology and success
- Feedback from customer references
- Overall ability to meet the City's requirements (software functionality, usability, performance, flexibility, and technology)
- Cost and support quality for ongoing software maintenance and support
- Demonstrated ability to work in a cooperative and collaborative manner with clients

At the completion of the proposal review, top ranking proposers may be asked to provide a presentation and demonstration of their product. The information provided in the presentation will be used, in addition to the information provided by the vendor in the proposal.

The City reserves the right to exercise the following rights and options with respect to the propsal submission, evaluation, and selection process under this RFP:

- Waive any informalities, defects, or irregularities not material to the proposal
- Reject any proposal not addressing the requirements of the RFP or incomplete as non-compliant

## 9. Selection Process

The selection process will involve the following phases:

Phase 1: A City selection committee will evaluate vendor submittals. The initial review will determine conformance to submission requirements and whether responses meet minimum criteria established. Review will include the vendor's acceptance of RFP terms and completeness of submissions.

Phase 2: If deemed necessary by the City's selection committee, interviews may be held for a short list of qualified vendors.

Phase 3:   Review team will check references provided.
Phase 4:   The City will select the successful vendor to begin negotiations as described in the
            Section 11.

## 10. Contract Negotiation & Insurance

It is the intent of the City that after the successful vendor has been selected, the City and the selected vendor will enter into contract negotiations containing all terms and conditions of the proposed service. Any acceptance of a proposal is contingent upon the execution of a written contract and the City shall not be contractually bound to any bidder prior to the execution of such written contractual agreement.

Before signing a contract with the successful vendor, the City requires satisfactory proof that the vendor has adequate insurance coverage for the work to be performed under the contract.

## 11. Proposal Submission Certification

By submitting a proposal, vendor certifies that the appropriate parties have carefully examined all the documents for the project, carefully and thoroughly reviewed this RFP, and understands the nature and scope of the work to be done and the terms and conditions thereof.