

Request for Proposal - Website and Citizen Engagement Platform

Addendum 2 – Answers to Submitted Questions

- 1 Does the City currently have an Agenda Management solution or does the stated process require a new technical solution? **No, this will be a new solution.**
- 2 Is the deadline of June 30, 2024 for completion of Phase 1 a hard deadline or will the City accept proposals that do not meet that date? If a hard deadline, what would be the minimum viable solution acceptable by the 6/30 deadline? **Due to the short timeline, we will accept proposals that have the completion of phase 1 work after the 6/30/24 deadline as stated in the RFP. If proposers anticipate their solution extending beyond the 6/30/24 date proposals should outline the work that will be completed by 6/30/24 and the remaining work done after that date.**
- 3 How should the Project Schedule section of the response (before Supporting Information) differ from the Timeline section in the body of the proposal response? Can you clarify what additional information you're seeking in the Project Schedule that would not be included in the Timeline? **These two sections can be combined in the proposals. We are just looking for a detailed list of tasks and the timelines to complete them. Milestones should be included to show completion of major tasks.**
- 4 Regarding the CMS element of Phase 1 specifically, is there a need/want for professional services related to information architecture, content optimization, or workshops/training for best practices on content creation? **If this is something that proposers believe improves the end product then proposers can include this as an additional services. Please ensure the costs of these additional service are clearly separated from the project costs.**
- 5 What is the target budget for each Phase and/or the project as a whole? **See question 6 and 8 from addendum 1**
- 6 Are there any incumbent vendors providing any of the requested services currently? **Our current website vendor is CivicPlus**
- 7 Are any Exceptions to the Professional Services Agreement included in the 22-page limit for the proposal document? **Exceptions that are noted to our professional services agreement will not count toward page limits.**
- 8 Is the requested Project Schedule on Page 9 of the RFP included in the 22-page limit? **Yes, the timeline and project schedule sections can be combined and will be counted in the page limit.**
- 9 Regarding customer portal, what are you specifically looking for in a CRM? **See question 23 in Addendum 1.**
- 10 What payment gateway are you using right now? **Authorize.net**
- 11 What level of integration with Arc GIS would you like to achieve? **This is a phase 3 goal so the scope isn't fully defined. Generally, we'd like to be able to extend some of the city's ArcGIS Online maps to the city's new website. This could be done through a plugin or direct integration.**
- 12 How many staff members would need system training, users, and admins? **Roughly 20-25 users, and 5 admin.**
- 13 Are there any examples of an existing citizen engagement platform or designs of one that the City of Sherwood team would like to see as a final product? **Staff does not have any current examples. It's expected that this will occur with the Sherwood Team and vendor during the design phase of this project.**
- 14 Is there any security/sensitive data that we will be processing? **None at this time.**
- 15 Who is the current provider of storage and infrastructure for the portal's operation and development? **See the response to question 6.**

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- 16 Are there any examples of the forms that need to be implemented? See the forms page on the city's website for some examples. <https://www.sherwoodoregon.gov/forms>. It's expected that City Staff through vendor supplied training will be able to implement most of these however proposers should give rough estimates to implement the processes/forms in Attachment A of the RFP.
- 17 What payment methods should be included? Which payment vendors should be included? Do we need to integrate with existing payment service vendors or do we need to provide our own solution? Should be able to accept both debit and credit cards as well as mobile payments (Apply Pay, PayPal, etc). The City currently uses Authorize.net so that would likely be the vendor we'd like integrated with but we are open to looking at other vendors.
- 18 Should the form have validation methods implemented? Should we use templates or provide the form creator? Or maybe both? Yes, we anticipate needing form validation for common fields. For the two business processes to be included with proposals basic validation should be included such as ensuring an agenda item is not input on a date there is no meeting scheduled and a code compliance complaint is not input on an address outside of Sherwood. With in the CRM/CMS we anticipate inputting data that can be used to validate form data off of. Templates and form creators should both be available however we anticipate city staff creating/modifying most forms.
- 19 Should we send out notifications to the users that are not registered on the website? Is there any user/citizens database that we need to integrate with or refer to? We will likely upload some baseline citizen information to the CRM/CMS but we don't anticipate sending bulk notifications for residents to sign up.
- 20 Which particular ADA accessibility standard is required (A, AA or AAA)? Proposals should plan to achieve AA compliance but include a summary of what design, navigational, content changes, and costs would be necessary to achieve AAA compliance.
- 21 Is it possible to conduct any user testing before the deployments? Yes, we'll plan on having staff available to test throughout the deployment.
- 22 What would be the highest load for the portal that we should expect? How many users are expected to use the website at the same time? Are there any periods with higher activity? Load and activity estimates are unknown as we don't currently have portal functionality on our current site. From a staff perspective we likely wouldn't have more than 5 users in the system at a time.
- 23 Will the City accept electronic signatures such as DocuSign on proposal forms requiring signatures? Yes
- 24 Does the City have a desired format for the Cost Proposal, or can vendors provide this in their own format (as long as it meets the RFP parameters)? As long as the requirements of the RFP are met and electronic proposals are in PDF format.
- 25 How many depositing accounts does the City have (one or multiple)? One account
- 26 What type of payments (credit card, Apple Pay, PayPal, digital currencies, etc.) would the City like to accept? Does this differ by department? See response to question 17. This would be the same across all departments.
- 27 Do any departments need Kiosks for physical payment locations? If so, how many? No

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- 28 Will the City please provide the following from your current payment provider for each participating department? **The city doesn't currently accept payments on it's website other than business licenses. The numbers below are only for business licensing.**
- 29 Total dollar value of payments accepted in last calendar year **\$76,892**
- 30 Total dollar value of credit card payments accepted in last calendar year **\$61,064**
- 31 Total number of transactions in last calendar year **601**
- 32 Average \$ amount per transaction in last calendar year **\$128**
- 33 Is this a new RFP or are there any incumbents? **This is a new RFP**
- 34 Do we need to submit details/resumes regarding identified resources? **Please follow requirements set forth in the Key Personnel section of the RFP**
- 35 Any major projects planned in coming years which vendors should be aware of? **None at this time**
- 36 What are the primary business drivers for issuing this RFP? **See response to question 29 in Addendum 1**
- 37 Are offshore resources allowed for this RFP? **Please see response to question 1 in Addendum 1.**
- 38 Is there a funding/financial/budget range estimated that can help us to provide a quotation for this project? **Please see response to question 6 and 8 in Addendum 1.**
- 39 Is there any subcontracting goal for this RFP? **Subcontracting must abide by the RFP and stipulations in the professional services agreement.**
- 40 Are you currently utilizing any CRM system? If so, could you specify the CRM you are using? **We currently use Salesforce and Infor Public Sector which have CRM functionality.**
- 41 What are the other platforms that the CRM would need to integrate with? What are each of those systems used for? **For the purpose of this RFP the CRM is to only integrate with the website for tracking of resident/customer inquiries. The CRM can be standalone but if it could be tied to the city's Salesforce or Infor products that would be ideal. Integration with other city systems would possibly be a phase 3 project which is not in-scope for this RFP.**
- 42 Would you please name your internal departments that use the CRM? **Public Works, Community Development and Broadband.**
- 43 Do you have a strong preference for Drupal & Word Press CMS or you are open to other custom-developed tech stacks that are very responsive? **See page two of the RFP**
- 44 Can you please specify the billing system that is currently used? **There is no integration with existing billing systems included in the Phase 1 and 2 scope of work. We use Authorize.net as a payment gateway.**
- 45 Who developed and currently maintaining the website? **See response to question 6**
- 46 What are the limitations and challenges that you are facing with the current site? **See response to question 29 in Addendum 1**
- 47 Do you expect to migrate the data from your current website to the new website? If yes, will the vendor be responsible for this? **See response to question 30 in Addendum 1**
- 48 Can you please specify the user groups and number of users who are accessing the website? **Users from all departments with a total of roughly 50 staff having access to the website.**
- 49 What is the total number of anticipated pages the site would have? **This is unknown but we anticipate having a similar number of pages that is on our current site.**
- 50 Do you expect the site to have SSO functionalities along with role-based access controls? **Yes**

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- 51 What is your preference for hosting? On-Premises or Cloud? **Our preference would be for vendor and/or cloud hosted.**
- 52 Do you expect the vendor to perform any tasks on-site, or can all work be performed remotely? **Remote work is ok.**
- 53 If a proposed resource becomes unavailable or allocated to any other project at the time of award/project start date can we deploy another resource with the same/similar experience and skillset? **No, personnel outlined in the RFP must allocated to our project unless alternate approved is approved by City Project Manager**
- 54 What is the overall budget associated with the project? **Please see response to question 6 and 8 in Addendum 1.**
- 55 Do you expect this engagement to be fixed-bid or Time & Material-based? **Fixed bid with hourly costs by role for work done outside the RFP scope.**
- 56 What is the overall contract tenure? **Contract will be through the implementation of phase 1 and 2. Ongoing support contract along with term should be included with proposals.**
- 57 What level of vendor support is anticipated post-go-live? A fully bundled resource (FTE) or a time & materials basis? **See page 2 and costs section of the RFP.**