



## RFP #021-220-17 Web Property Strategy and Redesign Questions and Answers

Pre-Proposal Conference: April 4, 2017 – 10:00 A.M.

### Questions and Answers re: RFP #021-220-17

Below are the questions that SFUSD has received regarding RFP #021-220-17, as well as the District's responses to these questions.

1	RFP requirements	Would an internal design team trained by our firm be preferable to direct involvement for design-focused Phase II activities?	We will work in partnership with the Proposer on the design, but we would like the Proposer to do most or all of the design-focused activities.
2	RFP requirements	In what form would analytics be preferred? Insights and analysis readouts? Raw data? At what cadence would you prefer research analysis be provided?	We would prefer insights and analysis readouts and recommendations based on the analyses. Analytics should be available real-time, or at least updated every 24 hours.
3	RFP requirements	Is there a reason beyond cost that Phase II is currently structured as the deep-design and development phase? If feasible, would deeper design activities and development be considered as Phase I?	It is based primarily on the budget currently available. A phased approach also helps scaffold internal capacity and stakeholder engagement.
4	RFP requirements	Would you like to see proof of insurance or other official operating documents beyond the requested financial statement, and included forms?	These are not required until we progress to signing a contract with the selected Proposer.
5	RFP requirements	SFUSD has requested that Proposers include a detailed description of types of accounts and services needed, as well as one-time and ongoing costs for those services. Assessment of this description is worth 5 points. Without knowing more about SFUSD's requirements for traffic, disk space, number of sites, data, legal limitations on hosting selection, etc. it is difficult to know what is needed and provide a budget. We would prefer to include recommendations regarding budgeting for accounts and services as part of a Phase 1 deliverable. In the meantime, will SFUSD consider removing the requirement to include these costs in the proposed budget? If not, can SFUSD clarify how these 5 points will be awarded based on this description?	We understand that the proposal will be general for Phase II costs, given that many requirements will be further refined during the Phase I process. As indicated in the Phase I Deliverables, there is an opportunity in Phase I to adjust the Phase II budget, as needed (in consultation with SFUSD project team).
6	RFP requirements	How many websites does SFUSD expect will be reviewed to address a "representative sample"?	SFUSD does not have a specific number in mind, although the websites examined should include at least one from each of the following categories: school website hosted on School Loop, school website not hosted on School Loop, unofficial department website
7	RFP requirements	How many users does SFUSD expect will be interviewed in order to inform user personas?	SFUSD does not have a specific number in mind, although users interviewed should include at least one from each of the following categories: students, families, teachers, school site administrators, central SFUSD staff, content owners, and SFUSD staff who will be admins of the CMS
8	RFP requirements	One of the deliverables is a first-level prototypes that reflect proposed information architecture and user path analysis for each major property. What fidelity is expected for these prototypes?	As indicated in Phase I Deliverables - Additional Details, section 3, low-fidelity wireframes are appropriate.
9	RFP requirements	Would SFUSD consider moving from Phase 2 to Phase 1 the requirement to determine what SSO provider to use?	Yes, we will move the SSO requirement into Phase I per an amendment to the RFP.

10	RFP requirements	SFUSD has asked for a copy of Proposer's "latest reviewed or audited financial statement". We have not been asked for this before. Can SFUSD please provide more details to guide small firms in ensuring they can be compliant with this request?	SFUSD will amend the RFP. Proposers with audited or third-party-reviewed financial statements will submit those, but SFUSD will accept unaudited statements if reviewed statements are not available. However, SFUSD reserves the right to require a third-party review of the Proposer's unreviewed financials if the Proposer is selected.
11	RFP requirements	SFUSD mentions using "the same reference criteria" for all references to be checked. What reference criteria will SFUSD be using with references?	Reference criteria are in development, but will comprise questions related to satisfaction with performance and results of work done in reference projects, and suggested guidance of how best to work with Proposer.
12	RFP requirements	Can SFUSD clarify what differences it expects in Proposer's responses to Proposal Requirements 1a and 1d? May Proposers combine these into a single response?	Yes, these answers could be effectively combined in a single response. Alternatively, 1a captures Proposer's high-level strategic approach and 1d outlines steps in greater detail.
13	RFP requirements	Related to our previous question, can SFUSD clarify how it will score differently "The Proposer's strategy to structure each element of the work and the targeted analytics" versus "Project workplan and project schedule"? The "strategy to structure each element of the work" and "workplan and schedule" appear difficult to disentangle.	See above. We will not penalize responders who choose to combine their responses to 1a and 1d. Scoring will be based on assessment of approach.
14	RFP requirements	SFUSD has requested "A detailed description of the Proposer's strategy to structure each element of the work as outlined in Phases I and II in this RFP, including the analytics the Proposer would seek to target.". In this context, is analytics synonymous with "project success metrics"?	Yes. SFUSD is interested in understanding how Proposer will assess progress/success at each stage.
16	Budget	Is there an estimated budget for this project? If you cannot specify exact numbers, are you able to provide us with a budget range? We understand that only Phase 1 is guaranteed, but would appreciate an approximation for what SFUSD intends to spend on this project. Is there a defined budget for this project that you can disclose? Are there budgets or budget limitations that can be shared in order to inform our response, potentially bringing areas of Phase II development into Phase I?	We are not sharing budget details/ thinking at this time. Funds already targeted can be reallocated if unspent. Future funding request(s) are TBD based on this RFP process and ongoing prioritization of other tech projects and other work. District is currently facing budget cuts so we are seeking lowest cost solution that effectively addresses our challenges and meets our goals.  If possible, Proposer can indicate what additional services could be provided for additional funds, ideally on a per-unit basis. For example: Baseline \$\$ to migrate ## pages; \$ for each additional # pages.
17	Budget	Can privately-raised funds be applied to Phase II investments? Kickstarters, or IndieGoGo campaigns led by the community?	We have no plans at the moment to look into this or to ask for additional grant funding, though the possibility of doing so has not been ruled out. SFUSD doesn't usually do Kickstarters or IndieGoGo for funding infrastructure projects like this.
18	Budget	Can you leverage student resources as part of work-study programs to diminish Phase II costs while fostering a platform for web and UX training?	We do not anticipate doing this, given the amount of resources and time it takes to train student interns.
19	Budget	Would existing financial data be shared in order to better form or articulated a Phase II response?	Our financial picture should be clearer when finalizing Phase I.
20	Budget	Are there revenue-generating cost-offsets directed at web- and UX related investments? Are there donation platforms or programs in place relative to web and UX related investments?	No, and we do not anticipate this in the future.
21	Budget	SFUSD mentions that funding is allocated for redesign and redevelopment of employee intranet. How much funding has been allocated for this work and what constraints exist regarding deliverables that must come out of this funding?	We are not sharing budget details at this time, given that any unused funds can be reallocated. Constraints and deliverables associated with current funding have been captured in this RFP.
22	Budget	SFUSD has expressed a clear need for a user-centered approach, presumably including interviews with dozens of stakeholders such as students, parents, families, teachers, staff, and administrators. How should vendors from outside of San Francisco budget for travel for these interviews? Should vendors assume interviews will be in person, and include travel + lodging costs in their proposal?	Interviews can be done remotely (SFUSD staff can help facilitate). If the Proposer chooses to conduct in-person interviews, any necessary travel and lodging expenses should be included in the Proposer's budget.
23	Budget	15 points for the Written Proposal are allocated to the Total project budget. How will these points be allocated? Does the lowest budget receive the most points?	The lowest budget will not necessarily receive the most points. Points will be allocated both on total dollar amount and based on how well thought out and realistic/ appropriate the budget is for the project.

24	Timeline	When is the anticipated launch date of the new web property?	Depends on the property, though we would like to launch the new intranet by January 2018.
25	Site analytics/Research	Can SFUSD provide us with estimated levels of traffic (in monthly page views) that each of your digital properties receive? How many pageviews do you have across all sites?	Public website: ~1 million pageviews/month Intranet: ~6,000 distinct users/ month; ~5,000 requests/ weekday Math Weebly site (self-reported): "thousands of visitors weekly" Other sites: no data available
26	Site analytics/Research	Can SFUSD speak more specifically to any pre-existing "available research and data"? What exists, to what extent were surveys or analysis done, and when was it done?	Public website: forum of content owners, CMS requirements (2014); user testing of enrollment section (2013); Google Analytics (2011-now) Intranet: See line 70 or click this link for partial SFUSD Intranet Redesign Research (done 2015-2016): <a href="https://drive.google.com/drive/folders/0B6B_whbuA_17YV9IN2VtUIZDckU?usp=sharing">https://drive.google.com/drive/folders/0B6B_whbuA_17YV9IN2VtUIZDckU?usp=sharing</a>
27	Site analytics/Research	In what format is the current research available? Is it publicly accessible or something our team can review to inform our response?	See above.
28	Independent Department Websites	Independent websites: SFUSD has listed some examples of Independent department websites. Is there a more complete list we can review?	Proposers can access a more complete list at <a href="https://docs.google.com/a/sfusd.edu/spreadsheets/d/1KT8CgXaoYZR5wLh7g-F7m8QxHCo3_Yo5z9Lh5THGVas/edit?usp=sharing">https://docs.google.com/a/sfusd.edu/spreadsheets/d/1KT8CgXaoYZR5wLh7g-F7m8QxHCo3_Yo5z9Lh5THGVas/edit?usp=sharing</a>
29	Hosting	What is monthly bandwidth across all sites?	For sfusd.edu, contract with our current provider requires "dedicated 10 Mbs burstable up to 50 Mbs." More detail on bandwidth usage by month is visible at <a href="http://bit.ly/2okyyR4">http://bit.ly/2okyyR4</a> For the intranet, our Sharepoint site currently takes up 408 GB of storage. We are working to determine our current intranet bandwidth.
30	Hosting	Do you require DDOS protection?	This would be advantageous to the district
31	Hosting	Does SFUSD require a site uptime SLA for hosting?	Yes, SFUSD requires: - 24/7 monitoring with 6am-6pm, 2 hour response; 6pm-6am, 4 hour response - Up to 2 hrs of support per month related to OS and user access - Advanced intrusion detection and prevention - 24/7 Emergency Hotline - Upgrade and/or migrate software application, limited to OS server software and associated packages as required to update and patch OS to maintain operability and performance of the public website and web content management tools. - Static content caching to increase availability in case of outages - Test/Staging instances
32	Hosting	Does SFUSD require a Support response time SLA?	See answer to Question 31
33	Hosting	What type of maintenance and support is ideal for SFUSD?	See answer to Question 31
34	Hosting	What is SFUSD's policy on cloud-based hosting on platforms such as AWS?	No objection as long as they meet our requirements.
35	Hosting	What is SFUSD's policy on managed hosting providers such as Acquia, Pantheon, WordPress VIP, WPEngine, etc?	No objection as long as they meet our requirements.
36	Hosting	How and where are the intranet, public website, extranet, and school loop websites currently hosted?	Public website - currently hosted by GGNet Intranet - currently hosted internally Extranet - currently hosted internally School Loop websites - currently hosted by School Loop externally
37	CMS	We see several benefits to taking a multisite Drupal approach for this project. Is SFUSD open to leveraging the same codebase across some/all of the web properties for this project?	Yes.
38	CMS	Are you open to an open-source CMS such as Drupal?	Yes, as long as we do not have to distribute any changes we make to the code.

39	CMS	SFUSD has indicated a preference for Open Source Software while also noting that not all Open Source Software licenses are acceptable. The two most widely used Open Source Content Management Systems (CMS) are WordPress and Drupal. Both WordPress and Drupal are licensed under the GPLv2. Does SFUSD accept software licensed GPLv2?	Yes, as long as we do not have to distribute any changes we make to the code.
40	CMS	SFUSD mentions a requirement for APIs to be built in the CMS. What specific requirements does SFUSD have for a CMS's API to support? We would like to understand these requirements to determine whether our proposed Open Source CMS supports these requirements out of the box, or will require customization (and if so, how much).	One particular use case would be automating the display of school information (eg. principal, school times, special programs, address, phone number, etc) so that it is not a manual process to update these pages (example visible at <a href="http://www.sfusd.edu/en/schools/school-information/alamo.html">http://www.sfusd.edu/en/schools/school-information/alamo.html</a> ). Additional use cases that would benefit from an API can be recommended during the assessment phase.
41	CMS	Why a custom system and not off the shelf?	We have previously looked at some off-the-shelf systems for school websites and believe that the SFUSD content owners who have created sites on platforms such as Weebly would be resistant to the limited template and design options that most off-the-shelf systems offer. However, we are willing to go with an off-the-shelf system if user research and analysis indicates that is the best choice and/ or there are additional customization options.
42	Content Administration	Understanding that you are looking for vendor advisement on governance, what type of flexibility are you looking to provide to individual schools? Simply content editing or some development capabilities around feature & function?	Some development capabilities around feature & function.
43	Content Administration	Would it be helpful if individual schools can create sites without coding?	Yes, very much.
44	Content Administration	If so, would it be helpful for individual schools to be able to spin up and customize their own sites based on a pre-built template formats? Or are you looking for vendor to design and build all websites on behalf of SFUSD?	We would like for schools to be able to customize their own sites based on pre-built templates and design guidelines.
45	Content Administration	Or would it be helpful for SFUSD DoT to be able to rapidly create sites without coding?	Ideal: minimize coding required on anyone's part required to create new sites. Use plug-and-play WYSIWYG templates.
46	Content Administration	Are there rules, workflows or regulations that govern how information is shared across departments and schools across the district?	This is a work in progress. SFUSD would benefit from governance recommendations/ best practices that address such issues.
47	Content Administration	What is the governing authority for SFUSD domain strategy and control?	DoT and Communications monitor this and strive to maintain control over domains.
48	Content Administration	What is the governing authority for SFUSD departmental sites if any?	There are published guidelines for non-sfusd.edu sites that are mostly followed. Communications monitors website content but there is no approval workflow built into the system. Intranet content is more loosely monitored.
49	Content Administration	What is the request process for the creation of new web properties, sites, experiences, modules?	Official process: Requestor submits request to Technology Help Desk or website administrator. There are published guidelines for non-sfusd.edu sites that are mostly, though not always, followed.
50	Content Administration	What resources do you have to extend and modify the existing web properties? Are they dedicated resources?	Public website: One to three people. One person oversees the day-to-day functioning of the site and one to two web programmers help occasionally with technical issues. This is not a full-time job for any of these people currently.  Intranet: One to two people. One person oversees the content of the site, and one helps with technical issues and forms. This is not a full-time job for either.  School websites and unofficial department websites: This varies depending on the school and the department.
51	Content Administration	Is there any user-type control at any level?	Yes, we currently use a distributed content approach so that content owners can update their intranet or public website pages on their own. For the public website, users are trained and provided with a Style Guide, which they are expected to follow.

52	Content Administration	As part of San Francisco's commitment to being a sanctuary city, are there areas of content or specific services offered to under-represented members of the community? (Re: Research SFUSD's audiences and create user personas)	The public website does not have specific areas of content or services related to San Francisco's sanctuary city status, although we have information on DACA for Dreamers and have many services and content for underrepresented members of the community.
53	Content Administration	Which languages have been identified for multilingual support? Are there plans to support languages other than Spanish? This is an important design consideration as page count and UX will be impacted by character-based languages.	The public website currently has Chinese and Spanish mirror sites that are translated manually. The Chinese is traditional characters for Cantonese speakers. The public website, and possibly individual school websites, would need Chinese and Spanish, and we would like to look into adding Arabic, Tagalog and Vietnamese. We are also looking for guidance on how to best manage translations.  The intranet does not need multilingual support.
54	Content Administration	Are there tools or platforms in place to track and resolve bugs, enhancements?	DoT uses ZenDesk for help desk services, but it is not being used for website bugs and enhancements.
55	Content Administration	Have you conducted a content audit to understand where duplicate information may potentially exist?	Not recently for the public website (last full-site redesign was in 2011) and not officially for intranet.
56	Content Administration	Who are the content creators for existing web properties?	Public website and intranet - employees in different departments with subject expertise. Communications staff (on team) manage home pages. Unofficial sites created by department staff. School websites created by school staff and/or parents.
57	Content Administration	Does content undergo a review process?	Public website - no, though input occasionally offered. Would like to look into feasibility of a review workflow. Intranet - no, though input occasionally offered. Ideal addition: embedded workflow for review. School website - depends on each school Department websites - depends on each department
58	Content Administration	What is the organizational management structure for the web team?	Online Content Coordinator (website) and Internal Communications Manager (intranet) report to Chief of Communications. Web programmers work in DoT.
59	Content Administration	Are 3rd party homework and curriculum management tools like GradeLink currently in place? How is School Loop related?	Yes, SFUSD currently uses School Loop but will be transitioning to Synergy Gradebook for homework/curriculum management in August 2017. For 2017-18, School Loop will only be used to host school websites, and hopefully we will transition off School Loop by the end of the 2017-18 school year.
60	Content Administration	What level of customization are you expecting for each individual school site? Do you expect each school site to have different functionality, or simply different colors/logos etc.?	Different school sites should be able to customize functionality and design within a given template/ framework.
61	Content Administration	What levels of customization are you looking for for school sites vs. the main sites?	All pages on the public website should have the same look and feel, with the possibility of alternate grid structures or layouts depending on webpage needs. We are looking for guidance on subsites. School sites should have a similar grid, but with flexibility in layout and colors.
62	Content Administration	What does SFUSD know currently about the number of users types and user permissions that are expected to become necessary in a new CMS? What roles does SFUSD envision as falling in "less tech-savvy content providers"?	Public website: currently has webmasters/ administrators and editors, looking for guidance on other roles and permissions. Intranet users include: owners, members, visitors, approvers and others, as designated at a page level. Many content providers (e.g., Humanities team) are less tech savvy and would benefit from WYSIWYG, rich text formatting, and plug-and-play templates.
63	Content Administration	Does the site serve minimum state or federal requirements for information sharing?	Yes, there is information we are required by law to share. There are also legal requirements re: accessibility we must meet. Many of these are articulated in the RFP.
64	Content Administration	Are there critical alert systems that the site must provide - emergency information, earthquakes, city-wide emergency management tools?	We provide emergency alerts on the homepage of the website and intranet, as needed. However, external "alert systems" are not currently incorporated.

65	Content Migration	How many pieces of content (web pages, images, files, etc.) do you anticipate needing migration and what source(s) will these be migrated from?	Exact content migration needs are to be determined during this process, using guidance re: archiving and efficiency/ effectiveness re: (re-)creation vs. migration. Appropriate content would be migrated from current web properties.
66	Content Migration	We don't understand clearly how much responsibility SFUSD wants to take on - versus as the Vendor to complete - for the following: content migration: for how many sites and pages will Vendor be responsible, vs. SFUSD content authoring: for how many sites and pages will Vendor be responsible, vs. SFUSD pages implementation vs. templates: for how many sites and pages will Vendor be responsible for full page implementation, vs. handing off templates launch: for which sites is Vendor responsible for launch vs. SFUSD managing launch? Do SFUSD's responsibilities for content migration, authoring, and page implementation create dependencies for launches that Vendor does not control?	Content migration: we would prefer for the vendor to migrate all appropriate content from the public website and the intranet, with the option of migrating school websites, although we will adjust expectations according to our budget and resources.  Content authoring: we would like recommendations from the vendor on how content should be organized and guidance on best practices, but do not expect the vendor to create content.  Page implementation: we would prefer for the vendor to implement all pages for the public website and the intranet in templates, with the option of implementing school websites, although we will adjust expectations according to our budget and resources.  Launch: we expect the vendor to help launch the public website and the intranet, with the option of launching school websites depending on our resources
67	Goals	What are some of the institutional goals your organization would like to accomplish with the new website?	SFUSD's goals are articulated in the RFP section "Project Purpose and Expectations" (pg 8-11).
68	Goals	How will these institutional goals be measured?	There are tools that help assess website legal compliance. Site analytics and user feedback will be used to measure other goals.
69	Goals	Could you provide a list of websites that you like or find visually appealing?	<a href="https://www.boston.gov/">https://www.boston.gov/</a> <a href="http://www.scusd.edu/intranet">http://www.scusd.edu/intranet</a> (open to public)
70	Intranet	Is it possible for SFUSD to provide Proposers with access to the current Intranet, so we can gain a deeper understanding? If not, would it be possible for SFUSD to provide a video walkthrough, or screenshots?	<a href="#">No, we cannot provide access to the intranet for Proposers prior to a contract being awarded. Click to see lightly annotated representative screen shots.</a>
71	Intranet	SFUSD has mentioned that currently the plan is to address the Intranet first. What are the biggest pain points SFUSD is currently experiencing with its Intranet?	See Intranet section of Project Purpose and Expectations (pg 8-9) in RFP for overview of pain points and goals. Or click this link to see partial SFUSD Intranet Redesign Research to date: <a href="https://drive.google.com/drive/folders/0B6B_whbuA_17YV9IN2VtUIZDckU?usp=sharing">https://drive.google.com/drive/folders/0B6B_whbuA_17YV9IN2VtUIZDckU?usp=sharing</a>
72	Intranet	Is SFUSD open to - if requirement gathering, user testing, product recommendations, and costing indicate it is the best strategy - rebuilding the intranet separately from the public website, school websites, and department websites. For example, is SFUSD open to the Intranet being built on the same Open Source CMS technology as the websites, or built on a commercial SaaS or self-hosted product?	Yes, we are open to all options at this point. While we anticipate a preference for the intranet to be built on the same CMS, in an ongoing effort to streamline systems and simplify content creation, we are open to a separate solution if that is what is recommended.
74	SFUSD Team	While we expect to interact with the entire SFUSD Project Team and with dozens of staff across SFUSD, we find that having a single designated point of contact who is empowered to make decisions and staffed & resourced to work with us is an important ingredient for project success. Does SFUSD expect to designate a single point of contact from either Communications or DoT to serve as a resourced and empowered decision maker / product owner? Will this PoC be full-time dedicated to this work? If not, how much time will this PoC be dedicated to this work, on a weekly basis?	There will be a single point of contact for the project, anticipated to be full-time. Details are pending.
75	SFUSD Team	Does SFUSD have designated Product Managers, Engineers, Designers, Content Managers, and Trainers on staff who this work will be eventually handed over to for ongoing product care?	Yes, SFUSD has some capacity to transition the project into its operations. We would also be interested in recommendations for a more distributed support model so departments and schools are not completely reliant on Communications and Department of Technology for updates.
76	SFUSD Team	What is the current size of the SFUSD web team?	See answer for Question 50
77	SFUSD Team	What would be outsourced?	Hosting, possibly one-off support for developing web applications or additional functionality.