REQUEST FOR PROPOSAL

WEBSITE DESIGN, IMPLEMENTATION AND CONTENT MANAGEMENT SYSTEM

ISSUE DATE
APRIL 23, 2014

RESPONSE DUE DATE
MAY 16, 2014, 4:00 P.M. P.S.T.

CONTACT
ELEANOR TORRES
DIRECTOR OF PUBLIC AFFAIRS
OCWD • 18700 WARD STREET
FOUNTAIN VALLEY • CA • 92708
(714) 378-3268 • ETORRES@OCWD.COM
REQUEST FOR PROPOSAL

OCWD Website Design, Implementation and Content Management System

April 23, 2014

To Potential Proposers:

RE: Request for Proposals for website design, implementation, and content management system for the Orange County Water District.

The Orange County Water District (OCWD) is soliciting proposals from qualified website developers with outstanding qualifications, experience, and knowledge to provide website design, website implementation services, and a content management system (CMS).

Background:

The Orange County Water District (OCWD) has been the entrusted guardian of the Orange County groundwater basin for more than 80 years. It is an industry leader in groundwater management, advanced water purification, and water quality monitoring and testing. It is internationally recognized for its planning, design, construction and operation of cost-effective water infrastructure projects in an environmentally responsible manner. OCWD is committed to working with local agencies to create over 1,100 acres of open space for public recreational use in Orange and Riverside Counties. It is the provider of reliable, locally-controlled groundwater, which is one-third the cost of imported water, saving cities and 2.4 million residents in north and central Orange County millions of dollars every year. Its Groundwater Replenishment System (GWRS) has become an essential component in the provision of reliable water for Orange County.

The GWRS is the world’s largest advanced water purification system for potable reuse and is the result of a collaborative effort between OCWD and the Orange County Sanitation District (OCSD). Both agencies sought solutions to issues they faced. In the mid-1990s OCWD needed to expand its Water Factory 21 to address continued problems with seawater intrusion. At the same time, OCSD faced the challenge of having to build a second ocean outfall. The GWRS resolved these issues. Both districts shared the cost of constructing the GWRS ($481 million US dollars). OCSD supplied OCWD with stringently controlled, secondary treated wastewater at no charge. OCWD in turn agreed to manage and fund the GWRS operations. Through this
collaboration, the GWRS emerged as one of the most celebrated civil engineering and water reuse projects in the world. It has received more than 40 awards, including the 2008 Stockholm Industry Water Award and most recently the 2014 U.S. Water Prize. The project currently produces 70 million gallons per day of high quality water. OCWD is currently expanding the GWRS. The initial expansion, which will be completed in early 2015, will take production to 100 million gallons per day, making enough water for nearly 850,000 people. The GWRS has helped Orange County better withstand droughts, which are estimated to occur three out of every ten years in California.

Existing Website:

OCWD currently maintains two websites: www.ocwd.com and www.gwrsystem.com. The specific services requested are in relation to the www.OCWD.com website. The site was redesigned approximately 8 years ago and has undergone multiple additions and technology updates. OCWD website is hosted externally on a virtual private server with a web-hosting company, with a majority of the content management, programming and tuning responsibilities handled by an inside staff, with minimal assistance of an outside contractor.

The website is a vital part of the District’s communications and outreach to stakeholders. It currently contains more than 50 individual pages and includes links to hosted and external PDF files, and external websites. The website structure, content, look and function are in need of update.

Approach and Initial Requirements:

The following outlines the approach and initial requirements for the new www.ocwd.com website. The specific requirements will be finalized with the selected vendor. These can be considered minimum requirements for scoping and cost development.

Note that during the Requirements process, some of these requirements may be prioritized and others may be identified as “future enhancements” (in particular if a requirement becomes cost prohibitive), and so it should be understood that there is flexibility in the final requirements list. For this reason, the vendor’s proposal should be clear as to whether any of these requirements are not assumed to be included in their technical or cost proposals.
Websites of Interest:

The following websites have elements that are creative, aesthetically appealing and/or easy to navigate.

www.ci.oceanside.ca.us/
www.gwrsystem.com
www.siwi.org/
www.ladwp.com
www.ocsd.com
http://www.discoverchurchill.org/
http://www.unausa.org/
http://www.visitdenmark.com/denmark/tourist-frontpage
http://www.at60inches.com/
http://www.ta2music.com/
http://marcorosella.com/#work
http://www.snowbird.com/
http://www.bryantparkhotel.com/
http://www.discoverlosangeles.com/

Design and Navigation:

The design of the site should be unified, consistent, visually appealing and inviting. The home page should provide a visual statement of “Who is OCWD” and provide easy navigation to a number of functions/capabilities for the District’s partner agencies, residents and businesses in the District’s service area, water, science and engineering experts, journalists, policy makers, and other interested parties. The competing interests of “simplicity and style” and “stylish capability and content” need to be balanced for the user. The end user’s needs should be considered at every step of the design and development process. The website should provide the user with a personal feel; not that
of a faceless public agency. The “two clicks to content” navigation approach should be maximized.

Content Management:

In the new site, OCWD staff will need to have a distributed, role-based ability to easily manage content. At a minimum, the following departments will manage content:

- Public Affairs staff will manage press releases, notices, events, newsletters, audio/video streams and related materials.
- Administration/Board Secretary will manage meeting calendars, agendas, Board packages, minutes, and related documents.
- Engineering and Public Affairs will manage content related to capital projects, development services, and other functions (status updates, images, documents, etc.).
- Purchasing will manage content on Request for Proposals, and materials related to vendors/suppliers/consultants.
- Human Resources will manage content regarding employment opportunities, submittals of employment applications, and related materials through the use of the NeoGov system.
- Management and/or Public Affairs may utilize blogging and other dynamic content tools. This may or may not include interactive capabilities (blogging comments, discussion threads, etc.).
- Management and public affairs will manage content related to public transparency.
- Public Affairs will utilize an online newsletter.
- Information Services staff will have the ability to assign roles and security as needed.
- Other roles will likely be identified in the requirements discovery process, but this demonstrates the concept of how the new site should work. Functionality for managing aging content (notification or automated processes for deleting content after specified time periods) would be desirable.

Relation to Other Web Services:

The District currently has or plans to have other web services that should be compatible with this new site, even if they are hosted externally to the main OCWD website. Development of these other capabilities is not included in this scope of
work; they are referenced here for explanation of content, and as requirements for compatibility. Examples of these include:

- Web-based File Transfer Protocol (FTP) or other large file transfer capabilities such as Citrix ShareFile. This would be a secured area for the District to use with vendors, other agencies, etc. This system would likely be a separate site with a link from the main site...

Not all of these services will be developed as part of the initial roll-out of the new web site, but the underlying technology of the new site needs to be compatible with these concepts so that they can be added at the appropriate time.

**Public Interaction:**

The requirements for the site to have the ability for the public/other entities to interact on the site (discussion threads, information requests, etc.) will be developed with the selected vendor. These may or may not require Web 2.0-type capabilities (collaboration, wikis, etc.). For purposes of Proposal preparation, assume there is a minimum functionality as follows:

- Provide for fast, accurate search of the site for content
- Fill out an employment application and submit to Human Resources (through use of NeoGov)
- Fill out an information request (Public Affairs)
- Fill out a public records request (District Clerk)
- Fill out a request to be added to an email list (Public Affairs)
- Fill out a request to be added to a prospective vendor list (Purchasing)
- Fill out a request to be added as a prospective contractor (Engineering)
- Log in and download certain files (e.g., specifications, As-Built Drawings, RFP’s etc.), from various departments.
- Others that will be discussed after selection include:
  - Videos
  - Podcasts
  - RSS feeds
  - Email/IM alerts
  - Mobile alerts
Technical Requirements:

During the requirements task, OCWD staff and the selected vendor will flesh out specific requirements, but examples of requirements will include designing and implementing a new OCWD website that:

- Optimizes fast page loading. Proposer to provide appropriate performance benchmarks.
- Optimizes Browser compatibility. Final site will be substantially compatible with the current versions of major browsers (Internet Explorer, Firefox, Safari, Opera, and Chrome)
- Provides site compatibility for mobile devices to include but not limited to iPhone, iPad, and Android devices. Proposer to identify any major compatibility constraints.
- Utilizes appropriate Internet Technology. Development of the site may be done using any of the major internet technologies (HTML5, XML, CSS, Java, JavaScript, ASP, etc.) so long as it meets the other requirements and there is sufficient separation/security so that it does not create undue security risks to the District’s information / systems.
- Utilizes a user-friendly Content Management System (CMS) that is based on the latest Microsoft .NET Framework. The current version is 4.5.1 at the time of writing this RFP. The current website database backend is Microsoft SQL Server Express 2012. The hosting environment is Microsoft Server 2012. The system should allow for internal staff to manage the website content easily.
- Leverages Search Engine Optimization (SEO) best practices throughout the website.
- Integrates and provides Analytics and Site Reports using Google Analytics to track and report website metrics.
- Provides Transparency pages and features that provide users easy accessibility to public records.
- Provides a printer friendly version of the website pages.
- Integrates with specific hosting, browser, and database platforms and blog/social media platforms, including, but not limited to: Twitter, Facebook, YouTube, Instagram, and Vimeo.
- Integrates hosting videos on various landing pages
- Integrates with external online reservation and payment systems.
- Utilizes design graphics and new content that elicits a greater awareness and support of District efforts.
• Domain management. District staff will have administrative authority over all domain names/registration; however, the selected vendor may provide support in ensuring all domains are current; acquisition of additional domain names, etc.

American Disabilities Act (ADA) Compliance:

The new site must be developed to meet all mandated access requirements adopted by the Federal Access Board (www.access-board.gov) under Section 508 subsection 1194.22 of the Rehabilitation Act. The proposing firm must also identify a satisfactory means for the District to test this compliance.

Other Core Elements of the Project Include:

• Leading the Project workgroup to define goals for the website, identify central messages to convey throughout the website, and identify target audiences
• Clear strategies and timeline to design and fully implement the new website; identify key milestones from project start through implementation
• Audit of the current website to determine what existing content can be utilized in the new website and what new content is needed.
• Creation of new content by the consultant as well as staff to create content in-house.
• Review and presentations before the OCWD Technology Ad Hoc Committee, Communications and Legislative Affairs Committee and the Board of Directors
• Creation of a metrics framework to measure website performance
• Testing and making necessary adjustments
• Rollout strategy to mobilize outreach efforts
• Strategic plan and timeline to help ensure content and technology is updated regularly and managed by OCWD staff and or webmaster
• Compatibility with www.gwrsystem.com tour, speaker and contact web based inquiry system

Language:

The site should be developed in English with the ability to translate pages into other languages utilizing Google Translate or other similar service.

Site Hosting:

The District expects to continue to host the website with a website hosting service. The selected vendor will have provided in their proposal sufficient information regarding
bandwidth and storage requirements, file backup, disaster recovery, and security capabilities that demonstrate to the District that current Information Technology best practices are in place and meet OCWD standards.

Ownership:

Once the District has accepted the site as completed, all artwork, imagery, coding, scripting, content, materials, and any software licenses acquired specifically to support this site become the property of Orange County Water District. The selected vendor will not provide, re-use, or otherwise make these materials available to other entities without prior approval of the District.

Scope of Work:

**Re-Design & Development:**

The selected vendor will take a lead in developing a new look and feel for the District website. At a minimum, the following tasks will be completed.

- **Develop Requirements:**

  The selected vendor will facilitate a work session with District staff at OCWD to identify roles and responsibilities; technical, graphical, content management, and other requirements for the site. Following this work session, selected follow-up discussions with the OCWD team members may be required to ensure completeness. The selected vendor will document the requirements in an organized fashion and provide to the District’s project manager for review, revision, and approval prior to initiation of subsequent tasks.

  Deliverable: Approved Requirements Plan

- **Graphic & Organization Design:**

  The vendor will provide sufficient materials (e.g., non-functioning “draft” web sites, hard copy, and descriptive information) to provide a minimum of three (3) alternative “look and feel” designs for the site. These sites should be available to OCWD staff using District computers, but should not be available to the general public. If deemed to be most effective, these draft sites may be hosted on OCWD host servers for demonstration purposes. The site should contain minimal sample content (to be provided by OCWD) at this stage, and functionality does not need to be incorporated, but each alternative must include:

    - Graphical
      - Color Palates


- Fonts
- Graphics/Imagery
- Organization
  - Navigational Structure of major elements (use requirements document and current web site as a template)
  - Example “click through” functionality

Note that OCWD has photographic and artistic materials that can be provided in electronic format to the vendor to use as inspiration or actual content in supporting this task.

OCWD will have sufficient time to review and comment on these sites, discuss “pros and cons” with the vendor, and ultimately select a site design for further development.

Deliverables: At least three (3) “look and feel” Draft Sites Approved Selected Design

- **Technology Design/Development:**

Based on the Approved selected design, the vendor will coordinate with District technical staff and use these discussions to define/refine the technical aspects of the site, including site architecture, technologies to be used, scripts/functional capabilities to be developed, and approaches for completion of the site. A site map (subject to revision as the site is developed) will be developed. These technical elements will be documented in a web site specifications document; this document will be provided to the OCWD project manager for review and approval prior to implementation.

Deliverables: Approved Technical Specifications Document

- **Conversion:**

- **Initial Conversion:**

Using a copy of the existing web site content, as well as other materials to be provided by OCWD staff (for content elements currently not on the site), the vendor will revise the selected site design and add in all necessary technology development functionality and content. As part of this process, OCWD staff will provide new content as needed (e.g., headers, footers, body text, images, documents, etc.) upon request of the vendor. This will be provided as a Draft “live” site that can be accessed by District staff at OCWD computers; it should not be made available to the general public. Graphic input will be provided by District staff.

Deliverable: Draft “Live” Website
• **Testing:**

Testing of the site will be provided by the vendor and by OCWD staff. The vendor will perform a series of tests to validate functionality of the site (as part of the initial conversion steps), and then provide notice to OCWD staff for purposes of secondary testing. OCWD will test the site against the approved Requirements Document and the approved Technical Specifications Documents. Error reports will be provided to the vendor, the vendor will notify when errors have been corrected, and then OCWD will re-test the appropriate elements. This iterative process will be repeated until all requirements are satisfactorily accomplished.

Deliverable: Completed testing checklists

• **Training:**

The vendor will provide a training session to all District staff that will be content providers to familiarize them with their portions of the new site. The vendor will provide “cheat sheet” handouts showing steps to the process of loading content. The training session would likely be a series of short sessions over the course of one day for each functional group of content providers.

Deliverable: Completed training sessions (attendance logs) Training Materials (handouts)

• **Final Conversion & Go-Live:**

In coordination with District staff, the vendor will perform all necessary actions to complete moving any relevant content to the final site, convert all appropriate IP addresses, DNS records, etc. to the new site, and ensure the new site is functioning and available to the public correctly. The vendor’s proposal should discuss how they will perform this action to minimize disruption and downtime between the time that the existing site is taken down and the time that the new site is available. Once completed, OCWD will perform a review of the live site and provide formal written acceptance.

Deliverable: Accepted Final Site

**Maintenance:**

In this task, the vendor will provide support to maintain the site and software for a period of one (1) to three (3) years, generally in increments corresponding with the District’s fiscal year (July 1-June 30), beginning with completion and Go-Live of the site.
• Interfaces & Technical Support:

The vendor will provide an estimate and approach to provide ongoing technical management/support for the site. Specific efforts are not defined at this time, but examples of the types of efforts that may occur include:

  o Provide technical capability for scripting new functions
  o Provide technical capability to integrate emerging technologies as new functions are required of the site
  o Provide technical updates/upgrades to the site to ensure ongoing browser compatibilities, resolve security concerns, etc.
  o Provide regularly scheduled staff interaction, perhaps a monthly scheduled meeting.

Because specific tasking is unknown at this time, the vendor should focus on approach to providing these services, as well as provide rates to provide this service (either on a monthly flat fee rate structure, hourly billing rates, or other mechanism).

Minimum Qualifications:

Submitting companies/contractors must meet the following minimum qualifications to submit a response to the solicitation:

  • Must be authorized to do business in the state of California
  • Provide samples of a minimum of six (6) websites previously designed
  • Must be able to provide the required insurance listed under “Selection Process” below.

Project Schedule (schedule subject to change):

<table>
<thead>
<tr>
<th>Date</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>April 23, 2014</td>
<td>RFP Opened</td>
</tr>
<tr>
<td>May 16, 2014</td>
<td>Bids due by 4:00 p.m. PST</td>
</tr>
<tr>
<td>May 23, 2014</td>
<td>Proposals Evaluated</td>
</tr>
<tr>
<td>May 28-June 6, 2014</td>
<td>Interviews for top 3-5 proposals</td>
</tr>
<tr>
<td>June 9-13, 2014</td>
<td>Top two proposals presented to the Technology Ad Hoc Committee for selection</td>
</tr>
</tbody>
</table>
July 3, 2014 Technology Ad Hoc Committee recommendation taken to the Communications and Legislative Affairs Committee

July 16, 2014 Board approves final proposal selection

July 17-July 31, 2014 Contract(s) processed and finalized

August 1, 2014 Project work begins

Proposal Submittal:

Thorough, yet concise proposals are recommended. Proposals are to be prepared at the applicant’s own expense. The proposal should include, but is not limited to:

- Information on the company, including years of experience, number of full time staff, and clientele.
- A description of the types of services the applicant would provide in supporting the District’s outreach program and applicable timelines to provide such services
- A description of logistics and project management systems related to the consultant engagement
- Information on the person or persons that will be assigned to the project, including names, titles, project roles, relationships to company (FTE, PTE, contract employee), skill sets, experience, knowledge base, etc.
- A brief description of comparable assignments for municipal clients
- Consultant fee information with a clear description of a fee structure (include any cost incentives or discounts that may apply) (include number of web pages fee will include)
- Client references with name, title, phone number and email
- Examples of six (6) websites previously designed
- Clear strategies and timeline to design and fully implement the new website; identify key milestones from project start through implementation

Proposals are due no later than 4:00 p.m. PST on Friday, May 16, 2014 at OCWD, 18700 Ward Street, Fountain Valley, CA 92728. Please address the package to the Public Affairs Department. Please provide ten (10) copies of the proposal(s), as well an electronic copy on a USB drive.
Selection Process:

The District proposes to select a consultant for final negotiation of scope and fee based on reviews of the proposals. Selection criteria will include project staff qualifications, project approach and creativity, related project experience, and project fee. Assurances that the consultant has the staff and capabilities to complete the project within its proposed time frame are very important. Staff recommendations for the two to three top proposals will be made before the Technology Ad Hoc Committee between June 9 and 13, 2014, at which time the Committee will make its selection. The Committee selection must be approved by the OCWD Board of Directors. The item for final approval will be included on the Board’s July 16 agenda. (Please see Project Schedule listed above).

The contract for the above supplies and services will be in accord with the District’s agreement. The minimum insurance requirements are $2 million for General Liability; $1 million Workers Compensation; $1 million Automobile Liability insurance; and $1 million Professional Liability. OCWD reserves the right to reject any or all proposals, waive any proposal informalities, and modify or postpone the proposal project at its sole discretion.

Proposals are due no later than 4:00 p.m. PST on Friday, May 16, 2014 at OCWD, 18700 Ward Street, Fountain Valley, CA 92728. Please address the package to the Public Affairs Department. Please provide ten (10) copies of the proposal(s) as well an electronic copy on a USB drive.

OCWD Contact Person:

The Project contact is:
Eleanor Torres, OCWD Director of Public Affairs
(714) 378-3268 • etorres@ocwd.com • (714) 963-0291 fax

Additional Information and Changes:

All requests for additional information should be made to the undersigned in writing (fax and e-mails are acceptable). No oral modifications of this RFP shall be valid. Any modifications shall be written by RFP addendum by OCWD’s Project Manager.

Sincerely,

Eleanor Torres
Director of Public Affairs