



Request for Proposals

Digital City Hall

PROPOSALS WILL BE RECEIVED UNTIL

12:00 Noon, Friday, June 29, 2018

in

**Purchasing Department, City Hall Building
101 North Main Street, Suite 324 Winston-Salem, NC 27101**

ADVERTISEMENT FOR PROPOSALS

Sealed proposals endorsed **Digital City Hall** for the City of Winston-Salem will be received by the City/County Purchasing Department in Suite 324, City Hall Building, 101 North Main Street, Winston-Salem, NC, **until 12:00 Noon, Friday, June 29, 2018**. Instructions for submitting proposals and/or receiving the complete RFP document specifications may be obtained during regular office hours at the same location, or by contacting Jerry Bates via email jerryjb@cityofws.org (Email is preferred) or phone 336-747-6939. The City reserves the right to reject any or all proposals.

Jerry Bates
Purchasing Director

This document IS NOT the complete proposal. To obtain the completed proposal specifications contact Jerry Bates via email jerryjb@cityofws.org, by phone 336-747-6939, or visit the Purchasing Department, City Hall Building, Suite 324, 101 North Main Street, Winston-Salem, NC during regular office hours.

INSTRUCTIONS TO PROPOSERS

INTRODUCTION:

This entire set of documents constitutes the RFP. The proposer must return the RFP with all information necessary to analyze properly the proposer's response as stated within the RFP document. **All proposals shall be returned in a sealed container/envelope marked "Digital City Hall"** and submitted to the City/County Purchasing Department in Suite 324, City Hall Building, 101 North Main Street, Winston-Salem, NC, no later than **12:00 Noon, Friday, June 29, 2018. Late proposals will not be considered.**

Proposer Questions and Inquiries

Proposer Questions and Inquiries relative to this RFP must be submitted **in writing only** by **12:00 Noon, Friday, June 1, 2018**, to Jerry Bates, City/County Purchasing Director, 101 North Main Street, Winston-Salem, NC 27101 or e-mail: jerryjb@cityofws.org (**Email is preferred**), Fax: (336) 727-2443. The City will provide written responses to all inquiries received by this date, and responses will be made available to all recipients of this RFP. Any oral responses made by any representative of the City may not be relied upon. Any supplements or amendments to this RFP will be in writing and furnished to potential bidders.

RFP Response Submission

Proposals must be submitted in a **sealed container/envelope** containing **one original (please mark document as original)** proposal showing original signatures and seals, **and four (4) copies** of the complete proposal. In addition to the five (5) paper copies, **please include one USB flash drive** containing only the information included in the hard copy version of the proposal in a PDF format and the drive must be clearly labeled with the Company Name and RFP name. Submittals **will not be accepted by fax or electronic mail.**

The City will not be obligated for the expenses of any provider arising out of preparation and/or submittal of responses to this RFP. Any and all proposals to this RFP are to be prepared at the cost and expense of the respondents, with the express understanding that there may be no claims whatsoever for the reimbursement of any costs, damages, or expenses relating to this procurement from the City or any other party for any reason (including the cancellation of this RFP).

Proposals must be made in the official name of the individual, firm, or corporation under which the business is conducted (showing official business address) and must be signed in ink by a person duly authorized to legally bind the business entity submitting the proposal.

All proposals should be complete and carefully worded and must convey all of the information requested by the City. If errors or exceptions are found in the proposal, or if the proposal fails to conform to the requirements of the RFP, the City will be the sole judge as to whether that variance is significant enough to reject the proposal.

Proposals should be prepared simply and economically. All data, materials, and documentation shall be available in a clear, concise form. The City reserves the right to reproduce proposals for internal use in the evaluation process.

Proposers are expressly forbidden from contacting any other city employee or city of Winston-Salem elected official regarding this Request for Proposals. Any such outside contact may result in disqualification from the request for proposal process.

Purpose of Request for Proposal (RFP)

The City of Winston-Salem (City) is requesting proposals from qualified vendors to replace our current Internet and Intranet websites with a comprehensive, full-featured, turnkey Web Content Management (WCM) solution and associated professional services to create a Digital City Hall with integrated website analytics, personalization, community engagement channels, and a focus on accessibility. The final solution will use a seamless branded interface for citizens, businesses, visitors and employees.

The following documents will form the basis for a contract and purchase order for the awarded vendor:

- This RFP document and any addenda,
- The submitted response,
- The signed City's Independent Contractor Agreement, and
- The final and signed Statement of Work.

Respondents must be the manufacturer or an established reseller/partner for the solution and services proposed, and the solution must be deployed and actively used at other local governmental agencies.

Strategic Plan

The City's Mayor and City Council adopted a four (4) year strategic plan (2017-2021) that includes updating the City's website and employee training.

The website project will support the delivery of the following Strategic Plan objectives and strategies:

Service Excellence

Objective 1: Ensure Service Delivery Efficiency and Effectiveness

Strategy 1.1: Close feedback loop with citizens.

Strategy 1.2: Update website, social media, and other resident communication strategies.

- Action Item 1.2.1: Review City website needs and propose redesigning the website to provide better communication strategies.
- Action Item 1.2.2: Increase the usability of the City's website search function.
- Action Item 1.2.3: Develop a strategy to train City Link staff to be social media liaisons.

Objective 2: Enhance Employee Professional Development and Training (Intranet)

- Action Strategy 2.1: Enhance professional development to include mission, vision, and value statements.

Livable Neighborhoods

Objective 5: Support Inclusion of Community Populations

Strategy 5.1: Create multicultural neighborhoods.

- Action Item 5.1.4: Develop digital community resource center to enhance communications and promote civic participation.

Strategy 5.2: Create innovative ways to celebrate culture, people, and history.

- Action Item: 5.2.1: Expand marketing efforts for current City events and programs.

Objective 7: Expand Access to Healthy Food Options

Strategy 7.2: Increase public education and marketing of healthy food options.

- Action Item 7.2.1: Explore partnerships with local organizations to provide public education and marketing of food banks, pantries, and community gardens to minimize duplication of services.

It is the expectation of the City that the vendor will use their knowledge and expertise to help us address additional strategic goals as appropriate for the proposed WCM Solution. The full Strategic Plan is available on the City's website at the following URL:

- <http://www.cityofws.org/Departments/Performance-and-Accountability/Strategic-Planning>

Digital City Hall

The City is embarking on an evolutionary redesign of its website to include expanded digital service offerings to enable enhanced customer self-service across all departments. Our goal is to provide services online for anything customers normally do at City Hall, at any time, and on any device; in essence, “the web site will be another door to City Hall”. We expect the launch of the new website components to follow an iterative pattern to “release early and iterate often.” In order to successfully implement a Digital City Hall, the City recognizes that there is a balance between form and function that is driven by the user experience (UX). Specifically, this effort will require emphasis on the following:

- Citizen-Centric Design, User Experience (UX) and User Testing
- Content Relevance and Continued Sustainability of Content
- Comprehensive Governance and Taxonomy
- Functional Priorities that go beyond providing Textual Information
- Functionality built to meet or exceed Section 508 Accessibility Requirements
 - Web Content Accessibility Guidelines (WCAG)
- Responsive Design
- Security
- Standardized and Optimized Transactional Services
- Technical Framework capable of integrating with our Business Applications

In support of the project, the City will provide a project team of City resources to contribute to the success of the WCM solution development and implementation. City resources will include a City executive sponsor, a project coordinator, web content coordinator and City Subject Matter Experts (SMEs) by operational and functional areas. The City expects that the vendor will be primarily responsible for content development and that the City’s core project team and web content editors will provide guidance to the vendor. The City expects that the vendor will lead the City team through an implementation that optimizes the capabilities of the WCM solution.

Simultaneously, with this website project, the City will be implementing a cloud based Electronic Payment Solution, upgrading or replacing our current Customer Service Relationship Management application, and deploying an Advanced Metering Infrastructure (AMI).

Background

The City’s current websites (www.cityofws.org and wshome.cityofws.org) are no longer on par with the needs of the community they serve and:

- Have not been modernized in at least several years
- Present an agency-centric view of the City’s services
- Present an overwhelming amount of static information
- Have not been optimized for digital transactions on mobile devices

The City’s public facing website currently receives approximately 1.75 million visits per year and serves 2,420 pages, which include links to 17,483 documents and 11,307 images. The City currently uses DNN (Dot Net Nuke) solution on-premises for Web Content Management (WCM) and would like to move the website to a cloud based solution.

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RFP General Information

| | |
|-------------------------------------|--|
| Due Date | 06/29/2018 12:00 PM |
| Transmittal of Response | <p>Jerry Bates Purchasing Director City/County Purchasing Department 101 North Main Street STE 300 Winston-Salem, NC 27101 (336) 727-8000 jerryjb@cityofws.org</p> |
| Electronic File Format | Microsoft Word and/or Adobe PDF |
| Questions | <p>Questions may be submitted on or before 12:00 noon on June 1, 2018. All questions must be submitted in writing to the street address and/or the email address listed above. Questions will be answered within five (5) business days of receipt or by June 8, 2018 and circulated to all whose interest is known as of that date.</p> |
| Responsibility for Ensuring Receipt | Responders are responsible for ensuring receipt of questions and of information. |
| Schedule: | <p>05/10/2018 – Release of RFP 06/01/2018 – 12:00 PM Deadline for Written Questions 06/08/2018 – Response to Questions 06/29/2018 – 12:00 PM Proposals Due 08/10/2018 – Initial Evaluation Completed 08/31/2018 – Finalist Demonstration 09/14/2018 – Recommendation to Steering Committee</p> |

WCM Solution Components

The City is looking for a vendor to redesign completely the appearance, taxonomy and content of the City's websites (Internet and Intranet) to increase the availability of online services and transactions and optimize the existing processes. The final solution will use a seamless branded interface for citizens, businesses, visitors and employees.

The WCM solution must meet the following minimum system requirements:

1. **Usability/Accessibility** – The majority of the system functionality must be easy-to-use by Residents, Businesses, Visitors and Employees. This includes, but is not limited to the following:
 - The navigation main top menu and any left or right navigation tools should be intuitive and meet best practice standards for government websites.
 - Digital services & information, payments and requests for service should be no more than 2-3 clicks (or one search) away from the home page of the website.
 - Functions used by web content editors to edit text, update an image, link a PDF document, or add/edit a form must be intuitive and readily available to non-IT professionals with minimal training.
 - The website must meet or exceed Section 508 accessibility standards.
2. **Interoperability/Architecture** – With minimal cost and effort, the system must have the ability to be interfaced with adjacent application technologies, services and other information sources using Application Programming Interface (API) calls. The underlying technology platform and associated architecture of the WCM solution must be compatible with the City's applications and associated Client/Server and Web Service APIs. Application integration discussions will center on the following:
 - Mapping – ESRI ArcGIS Online
 - Jobs – NeoGov
 - Meetings – Granicus
 - Call Center – Open311 API – CRM
 - Analytics – Google Analytics
 - Events – Microsoft Office365 Calendar
 - Social Media – Facebook, Twitter, Nextdoor, Instagram, Flickr, LinkedIn, Google+ and YouTube
 - Search – Google Site Search (or equivalent)
 - Employee Authentication – Microsoft Active Directory

The City has three (3) initiatives in progress to modernize the following applications:

- CRM – Customer Relationship Management
 - EPS – Electronic Payment Solution
 - AMI – Advanced Metering Infrastructure
3. **Engagement Analytics/Personalization** – The analytics must demonstrate the effectiveness or impact of the content on the City's Digital City Hall initiative and overall digital presence of the website. Specifically, web content editors will have access to readily consumable intelligence that will guide their efforts to focus on increasing the impact of our content and prioritize changes accordingly. The City requires that the system provide the ability to serve tailored content to targeted audiences and/or personas based on context. The City expects the engagement analytics to drive continuously the enhancement of content personalization.
 4. **Mobility/Multichannel** – The system will support cross-channel optimization and publish content that will be used by several channels at the City. This includes a companion native mobile application (iOS and Android) with features that support interactions with multiple target audiences and individuals while they are mobile (i.e. smartphones, tablets, beacons, digital signage, social media, etc.) in an effort to support the continuation of the customer journey. The City expects that portions of our website content will be multi-purposed and have the capability to span multiple channels of communication with the customer (e.g., SMS, Mobile Notifications, Digital Signage, Outbound IVR, Beacons, Kiosks, etc.).
 5. **Content Delivery** – The WCM solution will be a cloud based application with an interactive runtime environment capable of serving the City's website content at high speeds (i.e., less than one (1) second page load times) on all

platforms (i.e. Desktop, SmartPhone, Tablet, etc.). The City expects a high availability of service, with a service guarantee of 99.99% operational up time in any given calendar month (excluding downtime due to pre-scheduled maintenance). Maintenance windows include the upgrade or repairs of shared infrastructure, with scheduled notification of seventy-two (72) hours in advance and occurrences that do not occur during peak hours in the time zone of the City. The City's standard system maintenance window is from 6:00AM to 8:00AM on Saturdays.

6. **Cloud Capabilities** – The system must be cloud based and support integration with other cloud based solutions and on-premises application technologies. The vendor's system must be a SaaS (Software as a Service) product, requiring no on-premises servers at the City other than required for Microsoft Active Directory authentication.
7. **Web Forms** – The WCM solution must be able to manage basic application Web Forms to capture data entered by our customers (Residents, Businesses, Visitors and Employees). For example, customer feedback, first line contact, basic permits/application forms, or searching the City's application databases. Forms authoring functionality must leverage all key aspects of reusability, consistency and ease-of-use.
8. **Enterprise Collaboration** – To the extent possible with the WCM vendor's COTS (Commercial Off-The-Shelf) technology, the secured Employee section of the website will include an integrated portal to and leverage the collaboration functionality of Microsoft Office 365.

Vendors are encouraged to recommend any additional components they feel would improve the City's website, web content management, taxonomy development, design or the transition process. Vendors will work with the City to determine any needed interfaces with identified backend applications used at the City.

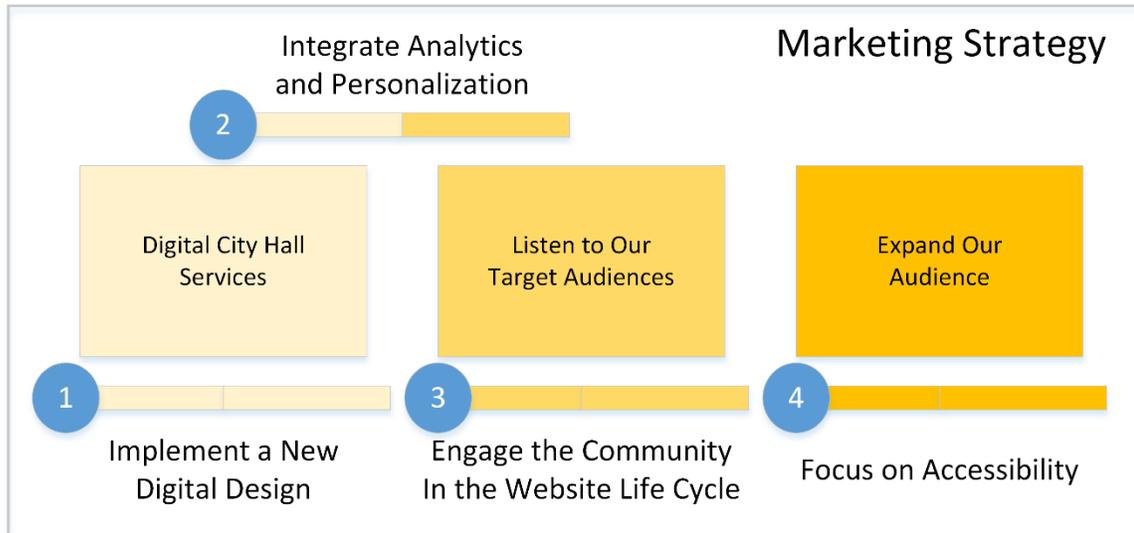
The City requires three (3) instances of the WCM solution: development, testing/training, and production.

The City requires that the vendor supply the means to migrate City approved content from the City's existing websites (Internet and Intranet) to the new WCM solution.

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Proposed Delivery Approach

The City realizes that it needs to transform the content on our websites from a department listing of services and an overwhelming volume of information to a citizen-focused website that provides prompt and accurate answers to questions about services. This represents a significant shift in our marketing strategy for web content delivery and the City recognizes that we will need expert advice and guidance to be successful. For this project, the City would like to employ the following four actions to build a Citizen-Centric Website as defined by Gartner, Inc.:



1) Implement a New Digital Design

The goal of improving the experience of our target audiences can be achieved by allowing our citizens to solve their problems or complete their tasks as easily and as quickly as possible with little or no direct contact with City employees. To do this, the City would like to use customer journey maps but is also open to alternative methods or approaches. As envisioned, this process will include social science experts and business unit leaders from across the City’s organization in order to create a cross-functional team capable of implementing the new digital design.

2) Integrate Analytics and Personalization

To facilitate continuous improvements to the UX (User eXperience), analytics will be used to enable data-driven decision making when updating content on the website. Any data used for analytics and personalization must maintain the anonymity of the individual users of the City’s websites and utilize the highest level of transparency as to what data is collected and how it is used. The following lists the six (6) types of personalization that the City is interested in including:

| Type | Example |
|--------------------|--|
| Preference | A citizen indicates that he/she is interested in specific subject(s) and a notification is sent when new pages are published and categorized with the same subject(s). |
| Channel | A citizen provides his/her mobile phone number so they can receive a text message when a Work Order is completed for a specific Service Request. |
| Product or Service | Based on a citizen completing the online application for a commercial new construction plan review, the website provides a notification for information about the online process to submit the required Fire Suppression plan review application(s). |
| Location | The citizen has the option to sort calendar events or news articles using a “nearby” feature of the website. |

| Type | Example |
|----------|---|
| Behavior | Based on a citizen’s search terms and page views about starting a small business, he/she is provided with an opportunity to request to speak with a Small Business Liaison. |
| Customer | A professional is provided a prepopulated web form when renewing his/her Business License. |

One example of personalization is the Benefits.gov website, <https://www.benefits.gov/>.

3) **Engage the Community**

We intend to engage the community in the Website Life Cycle to listen and identify the weak points in our service offerings. We will create a working group or advisory committee of interested citizens and social network influencers who are able to provide citizen-centric website guidance to the project team in all phases of the project. Specifically, the usability of the website’s Digital City Hall services to complete tasks and obtain actionable information about City services is critical to the initial implementation and the on-going maintenance. Analytics that measure the outcomes of real actions of citizens during public beta testing will allow the City to implement a website that delivers the most desired outcomes.

4) **Focus on Accessibility**

We intend to expand our audience by focusing on accessibility of our website. Section 508 and multiple language capabilities will continue to be part of the City’s web content strategy. The City would like to incorporate additional training and testing practices into our web content management process to increase the level of our content accessibility. In addition, the City would like to include the Building Integrated Communities website, <https://wshrd.squarespace.com/>, in our new website’s Digital City Hall services strategy.

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Selection Process

Proposals will be evaluated for quality, completeness, and price value to the City of Winston-Salem by an Evaluation Panel. Selection shall be made from all offers deemed to be fully qualified and best suited among those submitting proposals based on the evaluation of factors included in the RFP, including price. Price shall be considered, but need not be the sole determining factor. The Evaluation Panel may cancel this RFP or reject proposals at any time prior to an award and is not required to furnish a statement of the reason why a particular proposal was not deemed the most advantageous.

The City reserves the right, as part of the selection process, to request on-site (or virtual) demonstrations and/or presentations. In the event that such demonstrations or presentations take place, proposers will be selected for this process based on scores derived from the scoring matrix, which includes M/WBE participation, local availability, and all other applicable criteria. The scoring of the demonstration or presentation must be based upon the criteria from one or more of the original evaluation factors. After the demonstrations or presentations, each proposer will then be re-graded on the same criteria. The number of proposers chosen to take place in the demonstration/presentation process is subject to administrative discretion.

Evaluation Criteria

Below is a description of the evaluation criteria that will be used to evaluate the proposals. To be deemed responsive, it is important for the firm's proposal to contain appropriate detail to demonstrate satisfaction of each criterion and compliance with the performance provisions outlined in this RFP. The proposal will be the primary source of information used in the evaluation process. Proposal must contain information specifically related to the proposed services requested in this RFP. Failure of any firm to submit information requested may result in the elimination of the proposal from further evaluation.

The following weighted scale will be utilized by the Evaluation Panel to evaluate and score each proposal:

| Factor | Criteria | Weight |
|---------------|---------------------------------------|---------------|
| 1 | Experience / Methodology | 20% |
| 2 | Functionality – Architecture | 15% |
| 3 | Functionality – Critical Requirements | 15% |
| 4 | Price | 10% |
| 5 | M/WBE | 20% |
| 6 | Location of Business | 20% |

| Criteria | Definition | Section |
|---|--|-----------------------------|
| Factor 1: Experience / Methodology | | |
| <i>Willingness to Implement the Solution</i> | <i>Has the vendor demonstrated management commitment to tackle the project and be responsible for the overall project deliverables?</i> | V.1 |
| <i>Project Timeline Viability</i> | <i>Has the vendor demonstrated an understanding of the services requested by Winston-Salem by proposing a methodology and project timeline that will deliver a successful implementation of those services?</i> <i>- Does the implementation approach make sense?</i> <i>- Does it align to Winston-Salem's current capabilities and environment?</i> <i>- Does project schedule align with Winston-Salem expectations and business calendar?</i> | V.6, V.10, V.19 |
| <i>Technical and Industry Experience</i> | <i>Has the vendor demonstrated relevant experience in local government sector, as well as, the technologies requested by Winston-Salem?</i> <i>Has the vendor demonstrated the specific skills and experience to deliver the requested solution to Winston-Salem?</i> | V.2, V.11, V.12, V.13, V.17 |
| <i>Supplier Viability</i> | <i>Is the vendor considered organizationally and financially stable as an overall company?</i> | V.1, V.20 |
| <i>Experience in Providing Comparable Services (References)</i> | <i>Did the references indicate that the vendor has the required applicable experience and has the vendor delivered satisfactory results for similar project requirements?</i> | V.2, V.9 |

Factors 2 and 3: Functionality

| | | |
|---|--|--------------------------|
| <i>Solution Architecture Viability</i> | <i>Does the proposal describe an overall solution architecture that will support the functionality and level of service that Winston-Salem expects with regards to:</i> <ul style="list-style-type: none"> • <i>Usability/Accessibility</i> • <i>Interoperability/Architecture</i> • <i>Engagement Analytics/Personalization</i> • <i>Mobility/Multichannel</i> • <i>Content Delivery</i> • <i>Cloud Capabilities</i> • <i>Web Forms</i> • <i>Enterprise Collaboration</i> | V.3, V.5, V.7, V.8, V.18 |
| <i>Recognition of Critical Requirements</i> | <i>Does the proposal present an understanding on the part of the vendor of the critical Winston-Salem requirements?</i> <i>Are these requirements appropriately addressed in the vendor's responses to the respective specifications in RFP Appendix A?</i> | V.4 |

Factor 4: Price

| | | |
|-------------------------------|--|------------------|
| <i>One-time Project Costs</i> | <i>Does the pricing proposal provide reasonable one-time costs (hardware, software, services, implementation, etc.)?</i> | V.14, V.15, V.16 |
| <i>Ongoing support costs</i> | <i>Does the pricing proposal provide reasonable ongoing costs (maintenance, etc.)?</i> | |
| <i>Other costs or fees</i> | <i>Does the pricing proposal include other non-traditional costs or fees?</i> | |

| Criteria | Definition | Section |
|----------|------------|---------|
|----------|------------|---------|

Factor 5: M/WBE

| | | |
|---------------------------|---|------------------------|
| <i>MWBE Participation</i> | <p><i>Does the vendor's proposal indicate that they are able to comply with the City's M/WBE participation requirement, via:</i></p> <p><i>(1) submitted their M/WBE certificate in their proposal, OR</i></p> <p><i>(2) will award required portion of the project to a named M/WBE certified subcontractor, OR</i></p> <p><i>(3) has certified they made a good faith effort to comply but were unable to locate a qualified M/WBE subcontractor?</i></p> | See pages 33-43 |
|---------------------------|---|------------------------|

Factor 6: Location of Business

| | | |
|-----------------------------------|---|----------------------|
| <i>Local Vendor Participation</i> | <p><i>Does the vendor's proposal indicate that they are able to comply with the City's local participation requirement by having an office either:</i></p> <p><i>(1) within the City of Winston-Salem, OR</i></p> <p><i>(2) within the state of North Carolina?</i></p> | See pages 3-4 |
|-----------------------------------|---|----------------------|

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