



RESOLUTION AWARDING A ONE-YEAR PROFESSIONAL SERVICES CONTRACT TO LOWERCASE PRODUCTIONS, IN AN AMOUNT NOT TO EXCEED \$150,000, FOR THE REDESIGN AND UPGRADE OF THE TRANSPORTATION AUTHORITY'S WEBSITE, AND AUTHORIZING THE EXECUTIVE DIRECTOR TO NEGOTIATE CONTRACT PAYMENT TERMS AND NON-MATERIAL CONTRACT TERMS AND CONDITIONS

WHEREAS, The Transportation Authority uses its website to achieve several goals, including showcasing the agency's plans, programs, and project delivery efforts, serving as a resource for San Francisco transportation issues, data and topics, and informing the public and other stakeholders about ways to engage in the agency's work; and

WHEREAS, The Transportation Authority last hired a consultant to redesign its website in 2006, and seeks consultant services to implement a redesign and upgrade of the agency's website: www.sfcta.org; and

WHEREAS, On January 12, 2018, the Transportation Authority issued a Request for Proposals (RFP) for website redesign and upgrade services; and

WHEREAS, The Transportation Authority received 31 proposals in response to the RFP by the due date of January 24, 2018; and

WHEREAS, A review panel comprised of staff from San Francisco Environment and the Transportation Authority interviewed the five top-ranked firms between February 27-28, 2018; and

WHEREAS, Based on the results of this competitive selection process, the panel recommends the Board approve a consultant contract to the highest-ranked firm of lowercase productions; and

WHEREAS, The Transportation Authority has budgeted \$150,000 for the requested services, funded by sales tax operating funds; and

WHEREAS, This year's activities will be included in the Transportation Authority's Fiscal



Year (FY) 2017/18 budget amendment and the FY 2018/19 budget will include sufficient funds for the remaining activities; and

WHEREAS, At its February 28, 2018 meeting, the Citizens Advisory Committee was briefed on and unanimously adopted a motion of support for the staff recommendation; now, therefore, be it

RESOLVED, That the Transportation Authority hereby awards a one-year professional services contract to lowercase productions in an amount not to exceed \$150,000, for the redesign and upgrade of the Transportation Authority's website; and be it further

RESOLVED, That the Executive Director is hereby authorized to negotiate contract payment terms and non-material contract terms and conditions; and be it further

RESOLVED, That for the purposes of this resolution, "non-material" shall mean contract terms and conditions other than provisions related to the overall contract amount, terms of payment, and general scope of services; and be it further

RESOLVED, That notwithstanding the foregoing and any rule or policy of the Transportation Authority to the contrary, the Executive Director is expressly authorized to execute agreements and amendments to agreements that do not cause the total agreement value, as approved herein, to be exceeded and that do not expand the general scope of services.

Attachment:

1. Scope of Services

Attachment 1 – Scope of Services

There are six required tasks and one optional task, as detailed below:

Task 1: Project management

Task 2: Site analysis, architecture & content strategy, wire framing and design

Task 3: Theme development and application of design

Task 4: Programming and migration of existing pages

Task 5: Staff training and users guide

Task 6: Transfer to server and site launch

Task 7: Additional enhancements (optional)

Task 1: Project Management

A. Project Management: The consultant has a dedicated project manager on the project. The project manager will be the single point of contact during the entire project duration. The project manager is responsible for insuring all features, budget and scope of the project are met within expectations of the contract. The project manager will schedule recurring meetings to discuss:

- Key Project Indicators
- Project Milestones
- Mitigations
- Comments/Recent Accomplishments
- Issues
- Change Control

Deliverables:

- Monthly invoices by task
- Weekly progress meetings

Task 2: Site Analysis, Architecture & Content Strategy, Wire Framing and Design

A. Scoping and Elaboration: The consultant shall work with the Transportation Authority project team to scope the entire project and to elaborate on any areas that demand more details.

B. Content Strategy: The consultant will touch on the areas below with the Transportation Authority project team.

- Perform research to learn about the Transportation Authority and its website users
- Determine goals and determine how to measure success
- Define target user groups that inform design and functionality decisions
- Perform Inventory & Analysis to audit the current website and uncover opportunities for improvement
- Ensure all web pages support the agency's goals
- Design content to meet the agency's current and future communication goals
- Develop content strategy to help the project team structure and systemize content

C. Wire Framing: The consultant shall create a blueprint for the Transportation Authority website. The wireframes will outline structure and functionality, serving as a skeleton for the website, which

will form the foundation of the user experience and site architecture. The wireframes will illustrate how the site will work. The user experience design team will generate everything from low fidelity paper wireframes to high fidelity grey-box wireframes.

D. Graphic Design: The consultant, in coordination with the Transportation Authority, shall design the look and feel of the Transportation Authority site. The consultant shall focus on delivering designs that are visually appealing, clear and long-lasting.

Deliverables:

- Recommendations for changes to existing website content

Task 3: Theme Development and Application of Design

A. Theme Development: The consultant shall apply all designs and layout graphics to the website build. Theme work is all about interpreting the visual aspects of the website. The theme work must be compatible with the latest modern browsers.

Deliverables:

- Development of new design and layout theme

Task 4: Programming and Migration of Existing Pages

A. Website Building: Using the data which has been identified in the Scoping and Elaboration phase (Task 2A), the consultant will build the new website. This entails but is not limited to, content type creation, taxonomy creation and configuration of views and templates. The overall breadth of the development and the development timeline will be scoped and clarified in the Scoping and Elaboration phase of the project.

B. Data Migration: The consultant shall migrate appropriate data to the new website.

Task 5: Staff Training and Users Guide

A. Training: Consultant will set training sessions to train the members of the project team who will be responsible for its management and upkeep.

B. Development of users guide

Deliverables:

- Printed user guides enabling staff to troubleshoot, maintain and update newly launched website.
- In-person training session for staff on how to maintain and update the new website.

Task 6: Transfer to Server and Site Launch

A. Hosting Deployment Assistance: Making the website live on the new hosting provider is a coordinated event which starts during the quality assurance process. This is the on-boarding process. Secure Sockets Layer (SSL) if present is tested prior to launch. Domain Name System (DNS) swap is

the mechanism that makes the website live on the new host. Consultant shall work closely with the client team and the hosting provider team to ensure a smooth launch.

Deliverables:

- Launch of publicly accessible website; appropriate security features to protect data integrity while allowing public access

Task 7: Additional Enhancements (optional)

Consultant is invited to identify any additional enhancements related to the appearance or functionality of the website that it would recommend and that could be implemented for a budgeted amount not to exceed \$20,000. This is an optional task. Submissions for this optional task should be included as part of the overall consultant proposal.



Memorandum

Date: February 28, 2018
To: Transportation Authority Board
From: Cynthia Fong – Deputy Director for Finance and Administration
Subject: 03/13/18 Board Meeting: Approve a One-Year Professional Services Contract with lowercase productions in an Amount Not to Exceed \$150,000 for the Redesign and Upgrade of the Transportation Authority’s Website

<p>RECOMMENDATION <input type="checkbox"/> Information <input checked="" type="checkbox"/> Action</p> <ul style="list-style-type: none"> • Approve a one-year professional services contract with lowercase productions in an amount not to exceed \$150,000 for the redesign and upgrade of the Transportation Authority’s website • Authorize the Executive Director to negotiate contract payment terms and non-material terms and conditions <p>SUMMARY</p> <p>The Transportation Authority is seeking consultant services to implement a redesign and upgrade of the agency’s website: www.sfcta.org. A Request for Proposals (RFP) was issued in January. By the proposal due date 31 proposals were received, and following interviews with five firms, a review panel recommended lowercase productions to provide the requested services.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Fund Allocation <input type="checkbox"/> Fund Programming <input type="checkbox"/> Policy/Legislation <input type="checkbox"/> Plan/Study <input type="checkbox"/> Capital Project Oversight/Delivery <input type="checkbox"/> Budget/Finance <input checked="" type="checkbox"/> Contract/Agreement <input type="checkbox"/> Other: _____
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DISCUSSION

Background.

The Transportation Authority last hired a consultant to redesign its website in 2006. The Transportation Authority uses its website to achieve several goals, including:

- Showcasing the agency’s plans, programs, and project delivery efforts.
- Serving as a resource for San Francisco transportation issues, data and topics.
- Informing the public and other stakeholders about ways to get involved in – and give feedback about – the agency’s work.
- Distributing copies of reports, press releases, notifications and other documents.

The complete scope of services for the website redesign contractor is included as Attachment 1. The new website is expected to go live by December 2018.

Procurement Process.

The Transportation Authority issued a RFP for website redesign and upgrade services on January 12, 2018. While a pre-proposal conference was not held, proposers were able to submit questions to the

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Transportation Authority and receive responses by January 24. We took steps to encourage participation from small and disadvantaged business enterprises, including advertising in five local newspapers: the San Francisco Examiner, the San Francisco Bay View, Nichi Bei, the Small Business Exchange, and the San Francisco Bayview, as well as on LinkedIn. We also distributed the RFP and questions and answers to certified small, disadvantaged and local businesses, Bay Area and cultural Chambers of Commerce, and Small Business Councils.

Transportation Authority communications staff sought input on the website's redesign from the Citizens Advisory Committee via an online survey.

By the due date of February 12, 2018, we received 31 proposals in response to the RFP. A selection panel comprised of Transportation Authority and San Francisco Environment staff evaluated the proposals based on qualifications and other criteria identified in the RFP, including the proposer's understanding of project objectives, technical and management approach, capabilities and experience, cost, and Disadvantaged/Small/Local Business Enterprise (DBE/SBE/LBE) participation. The panel selected five firms to interview between February 27-28. Based on the competitive process defined in the RFP, the panel recommends that the Board award the contract to the highest-ranked firm: lowercase productions.

The panel unanimously agreed that lowercase productions distinguished itself through a number of criteria, including demonstrating a clear understanding of project objectives and clearly articulating the role that an improved website plays in the Transportation Authority's overall outreach and engagement efforts. lowercase productions also stood out for their technical and management approach. The assembled team has worked together on projects of a similar scope - including for the Metropolitan Transportation Commission (MTC) and San Francisco Public Works - and have demonstrated the ability to deliver websites that look good, offer critical functions and are based on robust technology. Additionally, this team showcased superior capabilities and experience. Team members have many years of experience and have worked jointly or independently for clients as diverse as City and County of San Francisco, YMCA, Habitat for Humanity, Contra Costa Transportation Authority, MTC, Intuit and ZenDesk, among others.

We established a DBE/SBE/LBE goal of 5% for this contract. Proposals from four of the five firms that were interviewed met or exceeded the goal. The lowercase production team includes 72% LBE and SBE participation from two subconsultants: Civic Edge Consulting and Exygy.

FINANCIAL IMPACT

The Transportation Authority has budgeted \$150,000 for the requested services, funded by sales tax operating funds. The Fiscal Year 2017/18 budget amendment will include this year's activities, and the Fiscal Year 2018/19 budget will include sufficient funds for the remaining activities.

CAC POSITION

The CAC considered this item at its February 28, 2018 meeting and unanimously adopted a motion of support for the staff recommendation.

SUPPLEMENTAL MATERIALS

Attachment 1 – Scope of Services