



Memorandum

Date: February 20, 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 the Top-Ranked Firm 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 the top-ranked firm 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. Due to the number of proposals received by the deadline, the selection panel needed to reschedule the interviews to allow more time to review and evaluate the proposals and determine interview selections. As a result, the panel has not completed the evaluation process in time to announce the top-ranked firm.</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 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 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 has selected five firms to interview between February 26-28.

We established a DBE/SBE/LBE goal of 5% for this contract. Proposals from 4 of the 5 firms to be interviewed met or exceeded the goal.

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 includes sufficient funds for the remaining activities.

CAC POSITION

The CAC will consider this item at its February 27, 2018 meeting.

SUPPLEMENTAL MATERIALS

Attachment 1 – Scope of Services

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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.