



REQUEST FOR PROPOSAL (RFP)

WEB REDESIGN AND CONTENT MANAGEMENT SYSTEM

PROPOSALS ARE DUE NO LATER THAN
Monday, July 30, 2018, 3:00PM PDT

1. Objective:

Casitas Municipal Water District (“District”) is soliciting bids to identify a vendor qualified to plan, execute, and deliver the redesign of Casitas’ website [www.casitaswater.org] and content management system.

2. Completing this RFP:

- a. Please review this RFP document in its entirety.
- b. Prepare and submit two hard copies and one electronic copy of your proposal package, which shall consist of: (1) Transmittal memo, (2) Technical Proposal, and (3) Cost Proposal (Microsoft Excel) via:
 - i. Mail or delivery: Attn: Michael Flood, Assistant General Manager, Casitas Municipal Water District, 1055 Ventura Avenue, Oak View, California 93011 and
 - ii. Electronically: mflood@casitaswater.com, pfung@casitaswater.com.
- c. Deadline: Proposals, hard copies and electronic version, must be received by Casitas no later than Monday, July 30, 2018, 3:00PM. No proposals will be accepted after July 30, 2018, 3:00PM. Postmarks will not be considered.

3. Questions regarding this RFP:

For clarification and questions regarding this RFP, please email: mflood@casitaswater.com and pfung@casitaswater.com. No phone calls please.

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I. INTRODUCTION

The Casitas Municipal Water District (“District”) is requesting proposals for a redesign of the District website www.casitaswater.org and content management system. The redesign of the website is an integral part of the District’s broader communications plan to enhance and improve the delivery of information and services to our customers.

There is no expressed or implied obligation for the District to reimburse responding firms for any expenses incurred in preparing proposals in response to this request. The District reserves the right to reject any or all proposals submitted.

Proposals submitted will be evaluated by individuals from the Public Information Office, Lake Casitas Recreation Area, and the General Manager’s Office. During the evaluation process, the District reserves the right, where it may serve the District’s best interest, to request additional information or clarifications from proposers, or to allow corrections of errors or omissions. At the discretion of the District, firms submitting proposals may be requested to make oral presentations as part of the evaluation process.

The District reserves the right to retain all proposals submitted and to use any ideas in a proposal regardless of whether that proposal is selected. Submission of a proposal indicates acceptance by the firm of the conditions contained in this Request for Proposal, unless clearly and specifically noted in the proposal submitted and confirmed in the agreement between the District and the firm selected. The District has a standard two-party Professional Service Agreement, to which adherence is assumed unless specific objections are noted in the proposal by the candidate firm. The Professional Services Agreement is attached. Please note the insurance requirement in the agreement.

It is anticipated the selection of a firm will be completed by August 31, 2018. Following the notification of the selected firm, it is expected the Professional Services Agreement will be executed between both parties by September 28, 2018.

II. Casitas Municipal Water District

a. About our customers and users of www.casitaswater.org

Casitas Municipal Water District provides water to retail (residential/commercial), wholesale, and agricultural customers in Western Ventura and the Ojai Valley area. In addition, the District operates the Lake Casitas Recreation Area, servicing customers who camp or visit the Casitas Water Adventures. In addition, District staff, elected officials, and prospective customers also visit the website for information.

b. Website Redesign Steering Committee

The vendor's principal contacts with the District will be Michael Flood, District Assistant General Manager and Po Chi Fung, Analyst – Public Information and Water Conservation, who will serve as the Project Manager.

The Website Redesign Steering Committee is primarily composed of Kevin Nguyen, IT Supervisor, Po Chi Fung, and Carol Belser, Recreation Manager.

c. Network Description

The Casitas Municipal Water District computer network utilizes a Microsoft Windows 2012 server network capable of handling speeds of 100-1000 megabits per second on a TCP/IP network with over 40 Microsoft based desktop computers and laptops. District computers and users are authenticated using various security protocols before accessing the District's internal network.

District communication system consists of Google Apps email system.

District information system data is stored on multiple systems from different vendors. Records are backed up daily and monthly for reliability and copies of weekly and/or monthly backups are sent offsite for redundancy.

The District uses Incode software for Utility Billing, Financial Systems (General Ledger, Payroll and Accounts Payable), Purchasing and Inventory, Land Management, and Human Resources. Furthermore, the District uses a SCADA system to collect production and water quality data from the District's large service area.

III. Assistance Provided to the Selected Vendor

District Personnel

Appropriate District employees, including responsible management personnel will be available during the process to assist the firm by providing information, documentation and explanations. Information Technology personnel will be available to provide systems documentation and explanations. The selected vendor will be provided use of the District's computer hardware and software if mutually agreed upon. Please include your information technology assistance request as a part of the Technical Proposal of this Request for Proposal.

IV. Scope of Work

The District is interested in a modern and clean website that can serve our customers - residential, commercial, agricultural, and recreational. The District would like a website that is easy to navigate and engaging, provides easily accessible information and education to customers and most importantly, improve the District's ability to provide customer service through electronic options for accounts, bill pay, reservations, and rebate applications and make emergency announcements. Lastly, the District is interested in a website that displays equally well on computer, tablets, and phones.

The District website will serve as the foundation for all of the District's current and future e-government services and as a platform for interactive public participation and information resource.

The District's primary goals for the website redesign:

1. **Easy to use:** Provide our website users with an easy to use and informative website that is up-to-date, interactive, accessible, and engaging. For example: A non-tech savvy resident would be able to get on the website and very quickly figure out how to register for an account and sign up to pay his/her bill.
2. **Integration with third party applications:** Provide website with ability to easily integrate with third party applications and two way systems such as those for bill pay, conservation rebate programs, notification/newsletter sign ups, recreation reservation, and employment application submissions, etc.
3. **Attractive and Consistent look and feel:** Provide a uniform, attractive, consistent look and feel to each web page that incorporates branding = modern, clean, uncluttered, graphically/photographically appealing to the eye.
4. **Easily updatable by multiple staff members:** Improve District non-technical staffs' ability to update the website and maintain pages with current information, photos and videos, graphics, and forms without html platform. The District would like the ability to assign a wide range of rights and privileges for pages/website to enable non-technical staff to carry out updates.
5. **Expandability:** Allow District staff to update, grow, and expand website without needing to plan a costly and time-consuming future redesign.

Technical Requirements for the website redesign:

1. **Web Content Management:** Non-technical District employees must be able to easily and quickly update and manage content on the District website through the following features:
 - a. Secure, browser-based administration
 - b. WYSIWYG text editor
 - c. Departmental/project update capabilities for web content
 - d. Content approval process
 - e. Single-source web publishing
 - f. Automatic conversion of MS Word formatting to HTML
 - g. Spelling and grammar check

- h. Email address masking
 - i. Content scheduling
 - j. Document central
 - k. Image library
 - l. Printable pages
 - m. ADA and WCAG compliant
 - n. E-commerce capabilities such as park and facility reservations, employment and rebate applications, and water rate calculator.
2. **Cross Platform/Browser Compatibility:** The website must be compatible with a wide range of web browsers (Google Chrome, Safari, Internet Explorer, Netscape, AOL, Lynx, screen readers, etc.) No special plug-ins other than Flash, Acrobat Reader or Microsoft Office viewers should be required.
 3. **Intuitive Navigation:** The information architecture must be user-centric and easy enough for users to navigate the website without requiring the use of the search engine tool to find information. There should be a standardized format and an enhanced graphical look for all pages that creates a unified theme throughout the site. The most important/most requested information should be accessible from the home page. Dynamic bread crumbs and a dynamic site map should be included.
 4. **Integrated Interactive Components:** Interactive components (i. e. calendars, e-subscription services, reservations, forms/surveys, and site search) should be implemented to make the website more engaging and useful for website visitors. Components should be easily updated by staff.
 5. **Accessibility:** The new website must meet accessibility requirements so that users with disabilities have full access to the website.
 6. **Quick loading:** Web pages on both high speed and low speed internet connections should load quickly.
 7. **Support online registrations and transactions:** This includes secure processing of applications and other forms online as well as the integration of partner sites which process credit card transactions.
 8. **No proprietary or non-standard code should be used.**

Additional Information:

Below are two websites that District staff have come across and would like to provide as a point of reference. We welcome your ideas and are open to different options that could satisfy District goals and technical requirements for its new website.

- <http://www.ebmud.com/>
- <https://www.lvmwd.com/>

The selected vendor will work closely with the District on the following:

1. **Plan the Redesign:** Work with the District Website Steering Committee to plan the redesign of the District website. This includes preparation of a project plan and schedule, project assessments, research, goals and objectives definitions, information architecture, site navigation, look and feel, content migration, site features and functionality, and technologies

and tools. It will also include integrating the Lake Casitas Recreation Area website with the Water District website. At least three different graphical mock-up and storyboard options must be provided in the planning phase of the website. The design must reflect the community served by the District as well as the District's mission, vision and values.

2. **Implement Redesign Plan:** Implement redesign based on plans agreed upon by the District. Implementation includes process and procedures, hardware and software installation, programming, graphic design and more.
3. **Quality Assurance and Testing:** Conduct quality assurance and testing on the redesigned website. Product must meet all goals (listed above), technical requirements (as detailed below) and other elements as agreed upon during the planning of the redesign.
4. **Launch the new website.**
5. **Archive old site and content.**
6. **Maintenance and Support:** Discuss required/recommended ongoing maintenance and support, if any. Separate out any costs associated with maintenance and support, and specify options for providing ongoing maintenance and support.
7. **Documentation and Training:** By the end of the project, provide complete website documentation for installation, maintenance, disaster recovery, and training purposes that is user-friendly, so that non-technical District employees can easily learn how to operate and update website. In addition, provide training and guidance/process documents as necessary.

V. Proposal Requirements in Detail

a. Transmittal Letter

A signed transmittal letter confirming the proposer's understanding of the work to be done, the commitment to perform the work within the time period, a statement of why the firm believes itself to be best qualified to perform the engagement and a statement that the proposal is a firm and irrevocable offer valid through December 31, 2018.

b. Technical Proposal

The purpose of the Technical Proposal is to demonstrate the qualifications, competence and capacity of the firms seeking to undertake the redesign of the District's website in conformity with the requirements (goals, technical requirements, etc.) of this Request for Proposal. The Technical Proposal should specify an approach that will meet the Request for Proposals requirements.

The Technical Proposal should address all the points outlined in the Request for Proposal (excluding any cost information, which should only be included in the Cost Proposal). The Technical Proposal should be prepared simply and economically, providing a straightforward and concise description of the proposer's capabilities to satisfy the requirements of the Request for Proposals.

While additional data may be presented, the following subjects must be included. They represent the criteria against which the proposal will be evaluated:

1. **Executive Summary:** A one-page summary of your experience with website redesign with other government agencies of a similar size, what components would be included in our website, your development approach, date of completion and cost.
2. **Company Information:**
 - a. List of 5 websites that your company has designed and developed within the last five years. Work that is similar and relevant to this project preferred. Please indicate the scope of work, date, total hours, and the name and telephone number of the client contact.
 - b. Describe your experience in producing websites for government agencies.
 - c. Provide three references from current and/or former clients within the last five years.
 - d. Provide background and experience levels of employees that will be assigned to this project. Please include their experience with implementations of similar applications/systems in comparable sized water districts.
3. **Project Proposal:**
 - a. Overview of proposed website redesign features and functionality.
 - b. Description of how your proposal will meet the current and future needs of the District's customers and stakeholders, District goals for its website redesign, and technical requirements.
 - c. Description of your proposed development process and approach on this project.

- d. Description of items you would need from the District and deadline for each item.
- e. Description of how you will involve and work closely with the Project Manager and Website Redesign Steering Committee.
- f. Proposed technologies and third party applications with justifications and benefits. Please include how proposed technologies and third party applications might perform better than currently used technologies and third party applications.
- g. Proposed schedule and timeline.
- h. Provide a thorough description of your implementation process.
- i. Describe the quality control procedures and testing methods you will take.
- j. Other value added approaches, ideas, recommendations, etc.

4. Firm/company Qualifications and Experience:

The proposer should state the size of the firm, the location of the office from which the work on this project is to be performed and the number and nature of the professional staff to be employed in this engagement on a full-time basis and the number and nature of the staff to be so employed on a part-time basis.

In addition, the firm shall provide information on the circumstances and status of any disciplinary action taken or pending against the firm during the past three (3) years with state regulatory bodies or professional organizations.

Note: No subcontractors shall be used for this project.

5. Employee Qualifications and Experience:

Identify the principal supervisory and management staff, managers, other supervisors and specialists, who would be assigned to this project. Provide as much information as possible regarding the number, qualifications, experience and training, including relevant continuing professional education, of the specific staff to be assigned to this project. Indicate how the quality of staff over the term of the agreement will be assured.

Supervisors, employees and specialists assigned to this project may be changed if those personnel leave the firm, are promoted or are assigned to another office. Personnel may be changed at the discretion of the proposer provided that replacements have substantially the same or better qualifications or experience. The District retains the right to approve or reject replacements.

6. Identification of Anticipated Potential Problems:

The proposal should identify and describe any anticipated potential problems, the firm's approach to resolving these problems and any special assistance that will be requested from the District.

7. Proposal Format:

The Technical Proposal is not to be more than ten single-sided pages in length including single page resumes of persons to be assigned to the project.

No dollars should be included in the Technical Proposal.

c. Cost Proposal

The Cost Proposal should contain all pricing information relative to performing the project as described in this Request for Proposal. The total all-inclusive maximum price is to contain all direct and indirect costs including all out-of-pocket expenses.

The first page of the Cost Proposal should include the following information:

- a. Name of Firm
- b. Certification that the person signing the Cost Proposal is entitled to represent the firm, empowered to submit the proposal, and authorized to sign a contract with the District.
- c. A brief schedule of how the project will progress and the anticipated completion date
- d. A total all-inclusive maximum annual price for the project

The second page of the Cost Proposal should provide a breakdown of the total maximum price, including but not limited to schedule of professional fees, hours anticipated for each, and out-of-pocket expenses.

Notes:

- The District will not be responsible for expenses incurred in preparing and submitting the Technical Proposal and Cost Proposal. Such costs should not be included in the proposal. The District is not responsible for submittals that are delinquent, lost, and mismarked.
- Out-of-Pocket expenses for firm personnel (e.g. travel, lodging and subsistence) will be reimbursed at the rates used by the District for its employees. All estimated out-of-pocket expenses to be reimbursed should be presented on the second page of the Cost Proposal. All expense reimbursements will be charged against the total all-inclusive maximum price submitted by the firm.
- If it should become necessary for the District to request the selected vendor to render any additional service to either supplement the services requested in this Request for Proposal, or to perform additional work as a result of the specific recommendations included in any report issued on this project, then such additional work shall be performed only if set forth in an addendum to the contract between the District and the firm. Any such additional work agreed to between the District and the firm shall be performed at the same rates set forth in the schedule of fees and expenses included in the Cost Proposal.

VI. RFP selection process and timeline

Proposals submitted will be evaluated by a committee made up of District management.

Proposals will be evaluated using four sets of criteria:

1. Knowledge and experience with government agency projects, especially with water and/or recreation districts of similar size and needs
2. Project strategy and approach in line with the District's in meeting all requirements (goals, technical, etc.)
3. Delivery schedule
4. Cost

Oral Presentation

During the evaluation process, the evaluation committee may, at its discretion, request any one or all firms to make oral presentations (in-person or skype). Such presentations will provide firms with an opportunity to answer any questions the evaluation committee may have on a firm's proposal. Not all firms will be asked to make such oral presentations.

Final Selection

The District will select a firm based upon the recommendation of the evaluation committee. It is anticipated that a firm will be selected and a contract will be executed between both parties by September 28, 2018.

Right to Reject Proposals

Submission of a proposal indicates acceptance by the firm of the conditions contained in this request for proposal unless clearly and specifically noted in the proposal submitted and confirmed in the contract between the District and the firm selected. The District reserves the right without prejudice to reject any or all proposals.

Labor Laws

The selected respondent and respondent's agents and employees shall comply with all applicable provisions of the Labor Code and all federal, state, and local laws and regulations that affect the hours of work, wages and other compensation of employees, nondiscrimination, and other conduct of work.

Timeline

The planning phase of the website redesign may commence upon notification to the selected vendor of the acceptance of their proposal and the signing of the Professional Services Agreement.

Manner of Payment

Progress payments will be made on the basis of hours of work completed during the course of the project and out-of-pocket expenses incurred in accordance with the firm's Cost Proposal. Interim billing shall cover a period of not less than a calendar month. Ten percent (10%) will be withheld from each billing pending the successful completion of the project.

VII. Purchase Order Terms and Conditions

1. The offer or acceptance to purchase the goods or services described on this purchase order are expressly limited to the acceptance of the terms contained in the description of this purchase order. These terms and conditions or written attachments referred to within the purchase order description and to no other terms other than those terms in the UCC which have not been changed by the purchase order, these terms and conditions, or written attachments referred to within the purchase order.
2. All purchases of chemicals shall come with a material safety data sheet. Casitas may, without penalty or liability, delay the payment on such chemical purchases until the material safety data sheet has been submitted to Casitas.
3. This Agreement is to be governed and construed in accordance with the laws of the State of California. Any lawsuit arising out of this Agreement shall be filed and prosecuted exclusively in Ventura County, California Superior Court.
4. Payments shall not be made until the delivery of the goods in satisfactory condition. Payments will be made within 30 days after delivery of the goods in satisfactory condition and submittal of an invoice for payment.
5. Casitas shall not be charged any interest charges on late payment of invoices.
6. Casitas may terminate the contract if delivery is not accomplished within 30 days of the date of the purchase order unless a different delivery time is established in the description section of the purchase order.
7. For computer parts, Casitas has to hire and pay an installer of the computer parts even if the parts are wrong. Thus, for any computer parts not delivery according to specification, the supplier agrees that such parts will not be paid for and not returned to the supplier as a liquidated damage not as a penalty.
8. No waivers of warranty will be valid, either expressed or implied.
9. Supplier agrees that Casitas shall not be subject to a restocking charge should any item have to be returned to the supplier.
10. If this purchase order is for goods over \$10,000 and the order is for other than FOB to Casitas' place of business, supplier shall insure the goods against loss and include that insurance in the cost of goods so provided under this purchase order.
11. Casitas shall not be required as part of any contract to submit any claims arising out of such contract to arbitration.