



BAY AREA
AIR QUALITY
MANAGEMENT
DISTRICT

May 19, 2014

**Request for Proposals
No. 2014-004**

**Web Maintenance and Projects
for the Bay Area Air Quality Management District**

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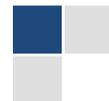
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SECTION I – SUMMARY

The Bay Area Air Quality Management District (hereinafter referred to as the “Air District”) requests proposals to provide web maintenance, support and project development, as detailed within this RFP. The contract will include the requirements identified in this RFP. Other deliverables will be defined and agreed upon in task orders to be developed by the Air District in concert with the selected vendor. The selected vendor will work closely and in collaboration with Air District management and staff, as well as with vendors for the ongoing Web Redesign and Rebuild project (currently under development) and with other vendors as needed for other projects that may impact the Air District websites.



Proposals must address all information required in this RFP. Local businesses, minority-owned business enterprises, women-owned business enterprises, veteran-owned business enterprises, and Certified Green Businesses are encouraged to submit proposals.

The Air District issues this RFP to seek bids from experienced and responsive vendors that will assume responsibility for system maintenance, enhancements, technical support, user support, and new development and / or third-party integrations as described in this RFP. The goal of the project is to provide for one year of maintenance and support, to assist with the transition to the new BAAQMD.gov website, and to develop and implement new features as needed. The selected vendor shall develop, implement and assume maintenance responsibility for all fixes, updates and enhancements to the Air District websites.

Applicants for this RFP must demonstrate knowledge of government business requirements and needs of Air District Website users; ensure developed and maintained applications adhere to government-required levels of accessibility (508) and information protection (per Air District Privacy Policy). The selected vendor shall have web development expertise with a minimum of five years of experience with the Sitecore CMS. Other required skills and experience include extensive .NET development, database development / maintenance, and IIS. San Francisco based vendors with government experience are strongly preferred.

To respond to this Request for Proposals (RFP), an interested company should submit two hard (2) copies and one (1) electronic copy (in Microsoft Office or Adobe Acrobat PDF file format) of its proposal to:

Mailing Address:

Tina Landis
Administrative Analyst
Bay Area Air Quality Management District
939 Ellis Street
San Francisco, CA 94109

Email Address:

tlandis@baaqmd.gov

**Proposals must be received at the Air District offices at
939 Ellis Street, San Francisco, California, 94109 by 12:30 pm on May 22, 2014.
Late proposals will not be considered.**

Proposals must address all information requested in this RFP. A proposal may add information not requested in this RFP, but the information should be in addition to, not instead of, the requested information and format. Minority business enterprises, women's business enterprises, veteran's business enterprises, and Certified Green Businesses are encouraged to submit proposals. **Any questions regarding this RFP should be directed to Tina Landis at: tlandis@baaqmd.gov.**

SECTION II – BACKGROUND

1. *Air District Overview*

The Bay Area Air Quality Management District was created by the California Legislature in 1955 as the first regional agency to deal with air pollution in California. The Air District jurisdiction includes Alameda, Contra Costa, Marin, Napa, Santa Clara, San Francisco, San Mateo, southwestern Solano and southern Sonoma counties. The Air District is governed by a 22-member Board of Directors, consisting of elected officials, including county supervisors, mayors, and city council members. The Chief Executive Officer of the Air District is the Air Pollution Control Officer, a position currently held by Jack Broadbent.

Air quality in the Bay Area has improved dramatically since the late 1960s, due in large part to the success of the Air District's industrial program and California's strict tail-pipe emission standards. However, the region still experiences excesses of the federal ozone (smog) and particulate standards, and continues to exceed the more stringent health-based California air quality standards.

2. *Current Rebuild and Redesign of the Air District website*

The Air District website, www.baaqmd.gov, is currently undergoing a redesign and rebuild.

The new website will serve the air quality information needs of the general population in the nine-county district of the San Francisco Bay Area, estimated at just over seven million. The Air District website has been an important online air quality resource for residents in the San Francisco Bay Area since April 1997.

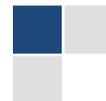
The Air District works to ensure that the website provides San Francisco Bay Area residents and businesses with the ability to access up-to-date information and perform actions such as (1) looking up the current air quality status, (2) finding out the latest air quality news, (3) filing a complaint (odor, visible pollution, wood smoke, or smoking vehicle), (4) obtaining forms and information for permitting and compliance, (5) submitting and tracking grant applications, (6) learning about community meetings and workshops, (7) obtaining forms that may apply to contractors and homeowners (such as those related to asbestos), and much more. The website also provides a wide range of information and assistance for other visitors, including businesses, representatives from the media, students and faculty from academic institutions, and regulatory agencies. The website is also used extensively by many Air District employees as a source of information and reference in their day-to-day work.

The Air District currently maintains development, staging and production environments for the website through a remote hosting service. The majority of the Air District's other information technology assets are hosted onsite at the Air District office located at 939 Ellis Street in San Francisco, CA.

3. *Other Air District websites*

The Air District maintains other websites that are currently managed within the Sitecore implementation or that fall under a planned migration to the Sitecore environment:

- www.sparetheair.org
- www.8774noburn.org



Additional websites may be added in the future.

SECTION III – SCOPE OF SERVICES FOR WEB MAINTENANCE AND PROJECTS

The Air District is seeking a vendor who can provide the following under a set number of hours (to be proposed by the vendor) per month:

I. Environment & System Maintenance & Support Requirements

The vendor will be required to provide the following:

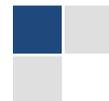
- a. Assistance with oversight and management of the current web-hosting contract for the Sitecore environment:
Vendor shall manage the cloud and dedicated system components, as well as work with the Air District and the Web Host to maintain and improve system uptime, website performance. Vendor shall provide for scalability and cost effective use of Web Host services.
- b. Technical issue resolution (network / system):
Vendor may often be the first line of defense when a network or system issue occurs. If a system becomes unavailable or a network error occurs, the vendor may be contacted first. At that point, the issue should be diagnosed, then addressed or handed over to the appropriate Air District IT staff person to resolve the underlying issue.
- c. Configuration of hosting environment:
Vendor shall handle initial and ongoing configuration of network access to/from the Rackspace cloud systems including configuration of new systems. In addition to System-level configuration, vendor shall create and maintain the Cloud-based system-level backups and manage their ongoing operation.
- d. Configuration of network access for hosting environment:
Vendor shall configure the Rackspace Cloud Network Access system which is analogous to a physical firewall, where network access is managed for Rackspace Cloud systems.
- e. Trouble shooting user level access at Rackspace:
Each cloud and physical system (including Sitecore environments) has its own set of user accounts that the vendor shall maintain. Service requests may include tasks such as new user requests for access or troubleshooting existing user access.
- f. System configuration of all environments:
The vendor shall configure all system environments.
- g. Secondary backup monitoring:
Hosting provider has primary responsibility for backups and their function, but Vendor should maintain, test, and review the system backups on a regular basis to insure they are valid and functioning.
- h. System or network defect / issue investigation & resolution:
Vendor will often be the first line of technical response once an issue is reported. The vendor will diagnose and resolve or assist with determining who can appropriately address the issue.
- i. Interface with the Air District IT Operations team to manage network connectivity between Air District officers and Sitecore hosting environment
- j. Management of Internet Information Services (IIS) in Sitecore hosting environment:
Configuration of IIS and sites, management of log generation and storage for all Sitecore Sites, and assistance with IIS redirects.

- k. Data store management:
Assistance with data storage requirements as needed.
- l. System administration tasks:
Includes all system level administration tasks for websites including operating system configuration, website configuration, and system monitoring, plus other administrative tasks as needed.
- m. System documentation:
The vendor will handle documentation both for technical code projects but also in some cases System and network documentation.
- n. Database management:
Database configuration and instance management, coordination with Air District on air quality data, analysis and implementation of backup practices and procedures, plus other database related tasks as needed

II. Sitecore CMS Maintenance & Support Requirements

The vendor will be required to provide the following:

- a. Complete regular software updates for Sitecore, Sitecore plug-ins and other associated software as-needed
- b. Resolution of Sitecore Bugs:
Vendor will resolve any Sitecore code defects and issues as requested by the Air District based on the Air District's priority for that task. Defects and issues will be managed through a web-based bug tracking system managed by the vendor.
- c. Sitecore research for functionality as needed:
This can occur both within the context of an assigned task, where a request is made and as part of the request is to determine the best Sitecore methodology in order to complete the task. This may include ad hoc requests where perhaps a feature is being discussed and the relevant decision makers need to know the options available for handling the request.
- d. Management of Sitecore configuration for all Sitecore environments (development, testing, staging, and production)
- e. Management of permissions, roles and access rights
- f. Acting as a primary point of contact for Sitecore code / System
- g. Workflow Management
- h. Resolution of content issues:
Vendor shall provide second tier content issue support, including analysis and resolution for any content issues or technical problems.
- i. Resolution of publishing issues:
Vendor shall provide second tier publishing issue support, including analysis and resolution for any publishing issues or technical problems.
- j. Security issues:
Vendor shall define security roles, user roles, privileges, permissions and performs other Sitecore security related tasks. Performs implementation of best practice security protocols and other security related tasks.



- k. Administration tasks:
Vendor shall perform general Sitecore system administration including module configuration, Sitecore settings, and other administrative tasks within Sitecore.
- l. System documentation:
Vendor shall develop custom feature documentation, system architecture documentation, Sitecore implementation documentation for each step of deployment, and other documentation as needed.
- m. Content organization:
Vendor shall provide assistance as needed with best practices for analysis and recommendations for Sitecore data organization.

III. Performance, Reliability, Issue Response & Disaster Recovery Requirements

The vendor will be required to provide the following:

- a. 24/7/365 Emergency Support (response to outages or other issues)
- b. Ad hoc technical issue resolution:
Vendor is the first level technical responder and is responsible for diagnosing and fixing website issues where possible. Where not possible, the Vendor should work to find the appropriate staff person to resolve the issue.
- c. Frequent check in on system status and corrective actions as-needed
- d. Repairs as needed to malfunctioning code or components
- e. Documentation of emergency response and resolution
(Cause, solution, downtime or other impacts)
- f. Assistance with monitoring site availability
- g. Intrusion Detection & Prevention
- h. Performance monitoring including latency issues
- i. Provide and manage issue reporting system
- j. Disaster recovery / Contingency plan – design, implementation and execution with full periodic testing of emergency recovery procedures
- k. Implementation of full site from backups as / if needed

IV. New Feature Development

The vendor will be required to provide the following:

- a. New projects / feature development
- b. New systems development, integration, review & support
- c. Development of project requirements and work as-needed with additional contractors, to include: General assistance and System Administration; Integration tasks and design updates to existing components; Source control and code-level management; Q/A, testing and deployment.
- d. New sub-site integration as-needed
- e. Regression testing:
Vendor shall test legacy components, develop and run automated full system testing procedures and ensure manual testing is done by developers and system administrators.
- f. Test plan development:
Vendor shall create plans and organize website testing.
- g. Initial testing:
Vendor shall do the first run at testing and ensure developer unit testing is performed on each feature / bug fix.

V. Support Requirements

The vendor will be required to provide the following support:

- a. Diagnosis of issues / user problems
- b. Web Team staff support as-needed
- c. Assistance to District staff to operate, update and maintain websites and services
- d. Phone consulting
- e. Training & Training Assistance
- f. Off hours and weekend support (when staff is not available or needs advanced assistance)
- g. Assistance with ongoing interaction as needed with existing and new third-party services (Rackspace, ExactTarget, Google, NeoGov, Payment Processors, etc.).
- h. Software installation, upgrades, and monitoring support

VI. Status Reporting and Project Management Requirements

The vendor will be required to provide the following Reporting and Project Management:

- a. Daily telephone check ins with Webmaster
- b. Monthly Maintenance Time Sheet
- c. Monthly Written Status Reports
- d. Monthly Updates on the Project Schedule

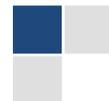
VII. Code and Backup Maintenance Requirements

The vendor will be required to provide the following code backups and maintenance:

- a. Source control management & backups:
The current source control for Air District websites is managed in GitHub. Vendor must maintain releases, maintain branches, administer access and generally insure the system is currently functioning.
- b. Log checking / management – review & diagnose:
Periodic / preemptive analysis of logs, detailed examination and diagnosis when issues arise, general log management including storage and backup.

Vendors should consider the following in their responses:

- Maintenance and development updates to support the following:
 - Scalability and extensibility of the websites
 - Implementation of web security best practices.
 - Acceptable performance (including uptime, tuning tasks, memory management, speed and responsiveness) and user experience
- Development of creative briefs for specialized projects.
- Collaboration with the Air District and the website redesign and rebuild vendors to successfully transition to the new BAAQMD.gov website.



- Development and implementation of a support plan (including a guarantee to fix and remedy all bugs found during this contract period).

Proposal Requirements – all proposals will need to include:

- I. Describe technical approach
- II. Description of team, experience and technical skills
- III. Cost breakdown (as outlined in the scope) of associated tasks and fees
- IV. Samples of relevant work for previous/current clients
- V. References
- VI. Response time for emergencies
- VII. Availability
- VIII. Proposed allotment of time per month & procedures for unused monthly hours
- IX. The proposal should also describe:
 - a. Project Approach
 - b. QA / QC Processes
 - c. Work Schedule
 - d. Monthly work task documentation

SECTION IV – INSTRUCTIONS TO THE VENDORS

1. General

- 1.1. All proposals must be made in accordance with the conditions of this RFP. Failure to address any of the requirements is grounds for rejection of this proposal.
- 1.2. All information should be complete, specific, and concise as possible.
- 1.3. Proposals should include any additional information that the respondent deems pertinent to the understanding and evaluation of the bid.
- 1.4. Proposals shall constitute firm offers. Once submitted, proposals cannot be altered without the written consent of the Air District, but proposals may be withdrawn.
- 1.5. The Air District reserves the right to reject any and all proposals.
- 1.6. All questions must be in written form and directed to Tina Landis and arrive no later than May 14, 2014. All questions will be answered in writing and posted on the Air District RFP webpage on May 19, 2014.
- 1.7. The cost for developing the proposal is the responsibility of the vendor, and shall not be chargeable to the Air District.
- 1.8. All responses to this RFP become property of the Air District and will be kept confidential until a recommendation for award of a contract has been announced. Thereafter, submittals are subject to public inspection and disclosure under the California Public Records Act. If a respondent believes that any portion of the submittal is exempt from public disclosure, it may mark that portion "confidential." The Air District will use reasonable means to ensure that such confidential information is safeguarded, but will not be held liable for inadvertent disclosure of the information. Proposals marked "confidential" in their entirety will not be honored, and the Air District will not deny public disclosure of any portion of submittals so marked.

By submitting a proposal with portions marked “confidential,” a respondent represents it has a good faith belief that such portions are exempt from disclosure under the California Public Records Act and agrees to reimburse the Air District for, and to indemnify, defend, and hold harmless the Air District, its officers, employees, and agents, from and against any and all claims, damages, losses, liabilities, suits, judgments, fines, penalties, costs, and expenses, including without limitation, attorneys’ fees, expenses, and court costs of any nature whatsoever, arising from or relating to the Air District’s non-disclosure of any such designated portions of a proposal.

SECTION V – PROPOSAL FORMAT AND CONTENTS

Submitted proposals must follow the format outlined below and include all requested information. Failure to submit proposals in the required format can result in the proposal being eliminated from evaluation and consideration.

1. Cover Letter

Proposals must include a cover letter signed by an official authorized to solicit business and enter into contracts for the firm with the name, address, and telephone number of the contact person, if different from the signatory.

2. Title Page

Proposals must include a title page that includes the RFP subject, the name of the firm, address, telephone number, name of the contact person, and the date.

3. Table of Contents

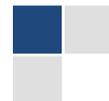
Proposals must include a table of contents that clearly identifies the material contained in the proposal by section and page number.

4. Executive Summary

Provide a summary of the overall approach to the project, including the objectives and scope of work.

5. Company/Firm Information (Section I)

- 5.1. Provide a statement of your firm’s background and related experience in providing similar services to governmental organizations. Describe the technical capabilities of the firm.
- 5.2. Provide, at a minimum, three (3) references for the projects cited as related experience; references shall include the name, title, address and telephone number of the person(s) at the client organization who is most knowledgeable about the work performed. The vendor may also supply references for other work not cited in this section as related experience.
- 5.3. List any sub-vendors that will be used, identifying functions to be performed by them, their related qualifications and experience and the total number of hours or percentage of time they



will spend on the contract. Also describe the contractual relationship and the responsibilities of the primary and subcontractors. Additional vendors added during the course of the contract require approval by the Air District.

- 5.4. Provide a general description of the firm's financial condition; identify any conditions (e.g., bankruptcy, pending litigation, planned office closures, impending merger) that may impede the vendor's ability to complete the project. At the District's discretion, proposers who are involved in current or pending bankruptcy proceedings may be rejected.

Previous or current Air District vendors may alternatively state that the Air District already has this information.

- 5.5. Describe any administrative proceedings, claims, lawsuits, settlements, or other liability exposures pending against your firm.

Previous or current Air District vendors may alternatively state that the Air District already has this information.

6. Project Approach & Organization (Section II)

- 6.1. Provide a statement detailing your approach to the project, specifically addressing the project objectives stated previously in this document, the Scope of Services, QA / QC Processes, technical approach, standard work schedule, task documentation, and any other information deemed relevant to the successful conclusion the project within the proposed schedule. The proposed schedule should include project milestones and benchmarks. Limit ten pages.
- 6.2. List response time for emergencies and availability to respond during and outside of standard office hours.

7. Assigned Personnel (Section III)

Provide the following information about the staff to be assigned to the project:

- 7.1. List lead personnel assigned to the project. Provide a description of their background, along with a summary of their experience in providing similar services for governmental agencies, and any specialized expertise they may have. Substitution of project manager will not be permitted without prior written approval from the Air District.
- 7.2. Provide a statement of the availability of staff in any local office with requisite qualifications and experience to conduct the requested project.
- 7.3. Provide a statement of education and training programs provided to, or required of, the staff involved in the project. Make particular reference to experience dealing with governmental agencies.

8. Cost Proposal (Section IV)

- 8.1. The cost proposal must list the fully-burdened hourly rates and the total number of hours estimated for each level of professional and administrative staff to be used to perform the tasks required by this RFP. In addition, costs should be estimated for each of the elements identified in the Scope of Services.

9. Retention of Working Papers (Section V)

- 9.1. All working papers are the property of the Air District. Include a statement acknowledging that if your firm is awarded the contract, you will retain project related papers and related reports for a minimum of seven (7) years.

Previous or current Air District vendors may alternatively state that the Air District already has this information.

10. Conflict of Interest (Section VI)

- 10.1. Address possible conflicts of interest. The Air District recognizes prospective vendors may have contracts to perform similar services for other clients. Include a complete list of such clients for the past three (3) years with the type of work performed and the total number of years performing such tasks for each client. The Air District reserves the right to consider the nature and extent of such work in evaluating the proposal.

Previous or current Air District vendors may alternatively state that the Air District already has this information.

11. Evidence of Ability to Provide Insurance (Section VII)

- 11.1. Proposers must demonstrate their ability to obtain required insurance with coverage values that meet minimum requirements evidenced by a letter from an underwriter or broker confirming that the Proposer can be insured for the required amounts. This proof shall take the form of the current Certificate of Liability Insurance (COLI) or a letter from Proposer's insurance agent or broker certifying that such insurance requirements can be obtained. If the certificate does not cover the requirements as specified in the Sample Agreement for Services, verification of availability of required insurance must otherwise be provided.

Previous or current Air District vendors may alternatively state that the Air District already has this information.

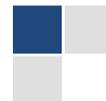
12. Additional Data (Section VIII)

- 12.1. Provide other essential data that may assist in the evaluation of the proposal (e.g., green business certification, etc.).

SECTION VI - PROPOSAL SCHEDULE & SUBMISSION GUIDELINES

1. Proposal Schedule

1	RFP RELEASE DATE	May 7, 2014
2	QUESTIONS DUE	May 14, 2014
3	ANSWERS PROVIDED VIA WEBSITE	May 19, 2014
4	PROPOSAL SUBMISSION DUE DATE	May 22, 2014
6	SELECTION OF FINALIST	May 23, 2014
7	CONTRACT SUBMISSION FOR BOARD CONSIDERATION	June 4, 2014
8	COMMENCEMENT OF CONTRACT	July 1, 2014



2. **Submission Guidelines**

- 2.1. All proposals must be submitted according to the specifications set forth in this RFP. Failure to adhere to these specifications may be cause for the rejection of the proposal.
- 2.2. Signature – All proposals should be signed by an authorized representative of the vendor.
- 2.3. Due Date – **All proposals are due no later than 12:30 p.m., May 22, 2014**, and should be directed to:

Tina Landis, Administrative Analyst
Bay Area Air Quality Management District
939 Ellis Street
San Francisco, CA 94109
Attn: RFP 2014-004

- 2.4. Submittal – Submit two hard (2) copies of the proposal in a sealed envelope to the mailing address above, plus one (1) electronic copy (in Microsoft Office or Adobe Acrobat PDF file format). Electronic submissions submitted via email will be acknowledged with a return email. Hard copies of the proposal shall plainly mark the upper, left-hand corner of the submission with the name and address of the bidder and the RFP number. Late proposals will not be accepted. Any correction or re-submission of proposals will not extend the submittal due date.
- 2.5. Addenda – The Air District may modify this RFP and/or issue supplementary information or guidelines relating to the RFP during the proposal preparation period.
- 2.6. Grounds for Rejection – A proposal may be immediately rejected at any time after the deadline, if it is not in the prescribed format, or is not signed by an individual authorized to represent the firm.
- 2.7. Disposition of the Proposals – All responses to this RFP become property of the Air District.
- 2.8. Modification – Once submitted, proposals, including the composition of the contracting team, cannot be altered without prior written consent of the Air District. All proposals shall constitute firm offers valid for ninety (90) days from **May 22, 2014**.

3. **Exceptions/Deviations**

- 3.1. Submittal of a proposal shall be deemed acceptance of all the terms set forth in this RFP and the sample Agreement for Services unless the vendor includes with its proposal, in writing, any exceptions or modifications requested by the vendor to the RFP and sample Agreement. The District will not consider exceptions received after the deadline for the submittal of proposals.
- 3.2. The vendor must have the sample agreement reviewed by their counsel prior to submitting a proposal, and redline of any changes must be submitted with the proposal. Any Contractual redlines must be accompanied by a reason as to why the change needs to be made.

SECTION VII – PROPOSAL EVALUATION

A panel of Air District staff will evaluate all proposals. The panel will recommend the selection of the vendor to the Air Pollution Control Officer, who will, in turn, make a recommendation to the Air District Board of Directors. The Air District Board of Directors must approve the contract to carry out the work described in this RFP.

Proposals will be evaluated on the following criteria:

Category	Description	Percent
Organization Background	Financial size and stability	5%
Expertise	Organization and its proposed resources have proven success delivering geospatial mapping and data visualization expertise that will meet project objectives; Accomplishments will include similar scope of work for other projects.	40%
Approach	Proposal addresses project requirements, reflects a clear understanding of meeting the project and agency objectives	40%
Cost	Proposal optimizes personnel cost effectiveness, expertise and allocation	10%
Firm's Specialty Focus Area	Minority-owned, veteran-owned, women-owned, Certified Green, or local business designations. Experience working with government agencies.	5%
Total		100%

SECTION VIII – SAMPLE AGREEMENT

A sample Master Services Contract to carry out the work described in this RFP is available on the District's website at <http://www.baaqmd.gov/Divisions/Administration/RFP-RFQ/Sample-Documents.aspx>

